SharePlus v3.8

USER'S MANUAL

Welcome to SharePlus User Manual! Here you will find useful information, tips and tutorials on how to use SharePlus. It will allow you to start using the app and will describe and explain how to use its more common features.

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INTRODUCTION

WHAT'S NEW IN SHAREPLUS V3.8?

SHAREPLUS PRO

- **Support for SharePoint 2013**
- **PDF Form filling:** easily fill your PDF forms containing the most common field types
- **Retina graphics:** SharePlus now comes in HD with all high-resolution graphics
- **New security features**
- **Fixes & performance enhancements around:** form based authentication, meeting workspaces, calendar lists, returning from inactivity mode, PDF files' treatment of non-English characters, Japanese localization, rich text & external keyboards, migration issues, image files' metadata, & dates on Excel files

SHAREPLUS ENTERPRISE

SharePlus Enterprise benefits from all the improvements made to the PRO and Lite versions.

SHAREPLUS DESCRIPTION

SharePlus is a mobile SharePoint client. With SharePlus you will be able to sync your favorite SharePoint lists and libraries automatically and take them with you in your iPad/iPhone/iPod Touch. Work with them on the go, and sync back to SharePoint when online.

With SharePlus you can collaborate with your team, share documents, calendars and tasks lists right from the meeting room, a taxi, or when out visiting a client, regardless of where that client is, and what network connectivity is like at his location. Browse and edit documents, discussions, announcements, wiki pages and custom lists. Capture images, video and audio directly from your device into SharePoint.

SharePlus will work with your current SharePoint credentials, so you won't have to ask for special permissions to use it. It relies on SharePoint's native web services API, it doesn't require any server side components, and it respects the server's security definition on the account used to connect (e.g.: if the account has read only privileges, the user will be able just to browse and read documents). User credentials are stored encrypted in the device, in the safest way possible provided by the iOS platform.

SharePoint's supported versions are SharePoint 2007, SharePoint 2010, and Microsoft SharePoint Online, included in the BPOS suite. It supports both Windows Based, and Forms Based authentication. The usage of client side certificates are supported as well.

SharePlus is a "universal" app. This means you can install it in your iPad, iPhone and iPod touch with one single license.

USER INTERFACE

When in landscape mode SharePlus' UI is divided in two panes. The left pane is the navigation pane; here you will be able to surf the site's structure (sites, sub-sites and lists). The right pane is the content pane; you will see the lists' content and item details here.

When in portrait mode SharePlus' UI will display the content pane only but you will see a button, in the left-top side of the screen, called Navigator. Tapping it will display the navigation pane. Opening and previewing list items

You can perform different actions on sites, sub-sites, lists, folders and list items, depending of what type they are and available actions:

SITES

Tap and hold

Edit Settings: access the Site Configuration dialog.
Clear Credentials Cache: delete credentials from local storage.
View in Web: vie the browser version of the site.

Swipe gesture

Delete: delete the selected site from SharePlus' Home.

Tap

Connect to and authenticate against the server and start browsing.

SUB-SITES

Tap and hold

Add to Favorites: add the selected sub-sit to your favorites.
View in Web: view the browser version of the site.

Tap

Browse the sub-site.

LISTS/LIBRARIES

Tap and Hold

Edit Settings: access the List Configuration dialog.
Reset Cache: delete all locally stored data for the list including cached data for offline browsing.
Add to Favorites: add the selected list to your favorites.
View in Web: view the browser version of the list.

Tap

Browse the list.

FOLDERS

Tap and Hold

Edit Item: access the item's properties in order to rename.
Add to Favorites: add the selected folder to your favorites.
Delete Folder: delete the selected folder from the current library.

Swipe

Delete and Rename (Only in Local Files)

Tap

Browse the folder.

ITEMS

Tap and Hold

The item's name

Edit Item: access the item's properties in edit mode.
Add to Favorites: add the item to your favorites.
Check Out: take ownership and gain exclusive control of a document. Available only when a document is not checked out. Discard Check Out: cancel Check Out. Available only when a document is checked out.
Check In: cede exclusive control over a checked out document. Available only when a document is checked out.
Delete Item

The item's icon

Copy URL: copy the selected item's URL to the clipboard.
Email URL: send a link to the selected item via e-mail.
Email Document: send a copy of the selected document via e-mail. This is available for documents and pictur
Copy to Local Files: copy the selected document to Local Files.
Edit: Access the Open In pop over to select a 3rd party app to edit the selected document. This is available for documents and picture

Swipe

Delete

Tap

The item's icon

Open the item

The item's name

Open the item's properties

SETTINGS

These settings will affect the app's behavior regardless the site you are browsing.

In order to access the General Settings dialog you must tap the gear icon at the home screen – it is in the bottom right side of the left pane.

You may also find the Help, FAQ, Feedback & Feature Request and About sections here.

PASSCODE LOCK

This feature allows you to make the app ask for a 4 digit passcode when you launch it or when you bring it to the foreground. Without this passcode you can't access the app. There is no way to recover or reset the passcode so bear in mind that if you lost or forget it you will have to reinstall the app.

PASS CODE LOCK IDLE TIME

After setting up your pass code as usual you can set a Pass Code Lock Idle Time value. This value will determine how long SharePlus will remain idle before bringing up the pass code lock screen.

REMOVE LOCAL FILES AFTER UPLOAD

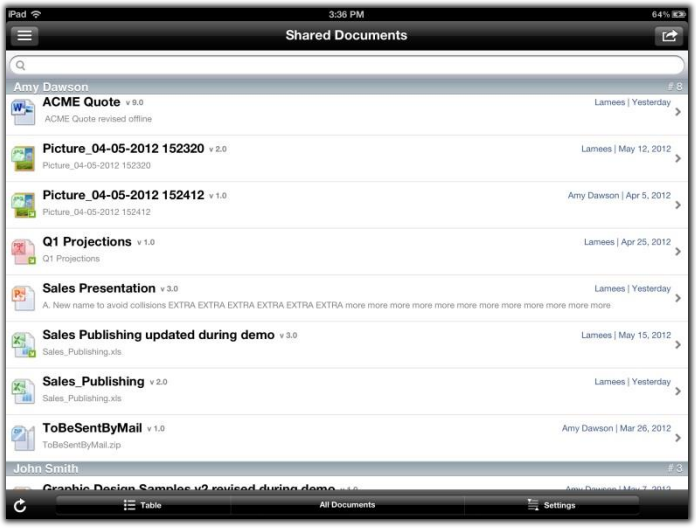
As you will see in this manual you can use local files to create new items or as attachments. When Temporal Local Files is enabled, the file used to create a new item or attachment will be deleted from Local Files.

PREVIEW DOCUMENT ON TAP

SharePlus default action when tapping a document's name is displaying its details or metadata. If Preview Document on Tap is set to ON the default action for tapping a document's name will be launching the document previewer. In this case, the app will show a "View Item" button that will allow you to see the item's metadata or details.

AUTO HIDE NAVIGATOR

SharePlus now has the possibility of auto-hiding the left side navigator. When the Auto Hide Navigator setting is ON, the navigator will auto hide when you browse a list. You will be able to bring it back by swiping right or hide the navigator by tapping the navigator button:



This feature and setting is only available in iOS 5.x and above.

DISABLE AUTO-LOCK

iOS devices have the option to auto-lock themselves after a pre-defined amount of time. If your device has auto-lock enabled but you don't want it to lock itself when you are using SharePlus you may turn on Disable Auto-Lock.

During Preview

If this option is set to ON auto-lock becomes disabled when previewing a document.

During Sync

Disables auto-lock when SharePlus is synchronizing offline support enabled lists.

Device must be plugged in

When enabled, the device won't auto-lock while being plugged in.

ADVANCED SETTINGS

Timeout (sec)

It sets the most seconds SharePlus will try to connect using a network. If there is no response after the specific amount of seconds, specified by this value, the app will stop trying to connect and will give you a "Connection timeout" error.

User Agent

The User Agent option allows the user to specify a user agent for SharePlus. This is particularly useful when the SharePoint site is published using Forefront UAG.

SSL Level

Due to iOS 5 interoperability issues (see this technical note) and some sites using old encryption methods SharePlus has the ability to be configured to select what certificate version will be used.

Idle Time (sec)

It is a value in seconds that specifies how much time should SharePlus wait before triggering the synchronization process. After this time the app considers itself as idle and starts syncing the libraries and lists for which you have enabled Offline Support.

Technical Log

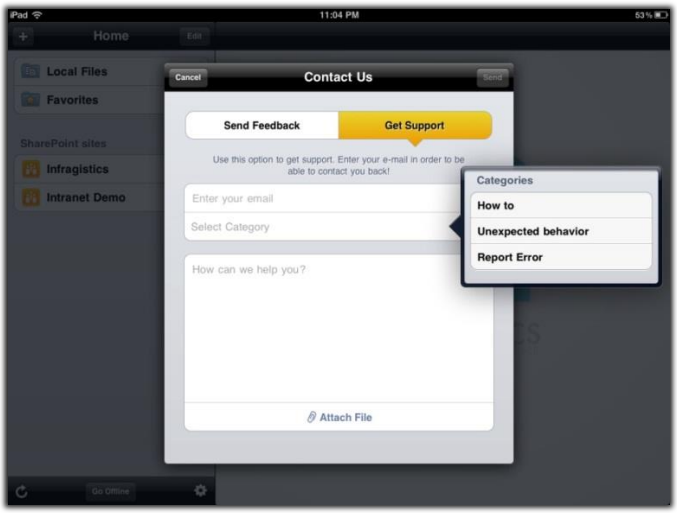
When set to ON, SharePlus will create logs that can help support technicians troubleshoot connectivity issues, for example.

FEEDBACK AND SUPPORT

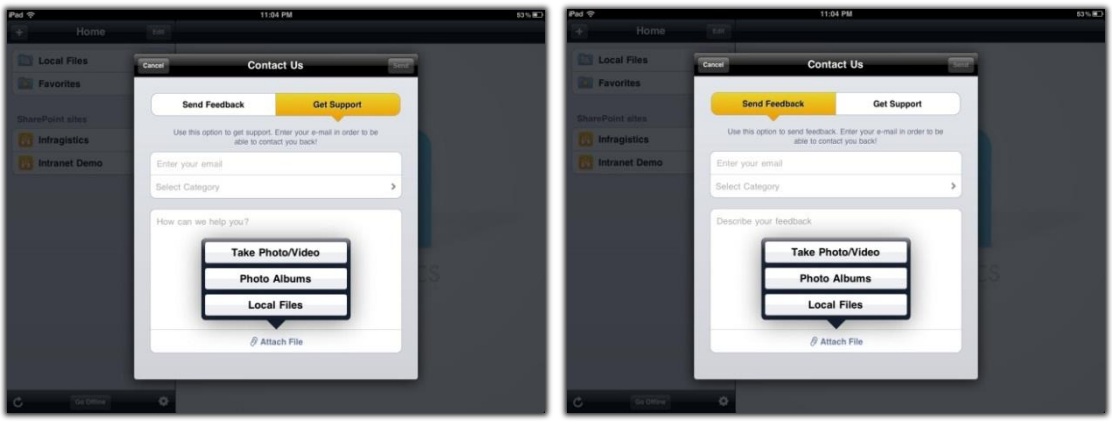
Communicating with Infragistics from within the app is easier now. In the settings you can tap the Feedback & Support button to send us feedback or get support, or tap the envelope button in the navigator.

You can like or dislike the app, send us feedback in the form of a comment, an idea, a feature request or simple share your thoughts about SharePlus.

If you need to know how to do something with SharePlus or report an unexpected behavior or error you may tap the Get Support button:

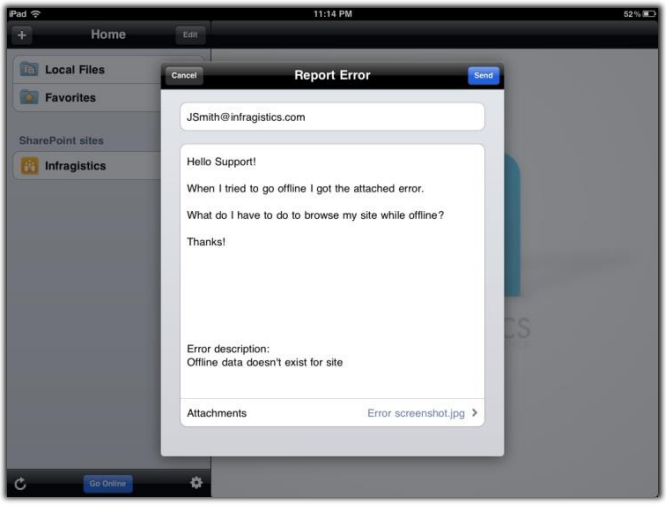


In both options you can add attachments (from your camera, photo albums or even SharePlus Local Files) that could help us provide you a better support or understand your ideas:



If, by any chance, SharePlus detects an error, besides an alert describing the issue you will get the opportunity to report it:

Once you tap the Report Error button a message dialog will appear for you to input your email address and a message – and, if needed, an attachment as well. The error description will be automatically copied in the message's footer:



SETTING UP A NEW CONNECTION

In order for you to access your SharePoint site with SharePlus you have to set up a new connection. Once you have configured the new site, you will be able to browse its sub-sites and lists, and their content.

SITE

The site section of the Add Site dialog has 2 options:

NAME

It's the name that your site will have in SharePlus. This doesn't affect the site's configuration at all. It is just a name and, even though it is required, it doesn't play an important role in setting up the site. The name will never be a source of connectivity issues.

URL

You must input your site's address here. You will have to make sure that you input the site's URL and not a sub-site's or a list's because they won't work even if they do on Safari browser. You may also double check whether your site uses secure HTTP (aka HTTPS) or regular HTTP.

AUTHENTICATION

The authentication section is where you input your credentials. These are used to authenticate against your server and are required.

If web-like authentication mechanisms, such as Office 365 and Web Login, are selected then you won't be required to input your credentials. A web view of the online authentication form will be displayed instead.

In the authentication section you will see:

MODE

Here you'll have to select what authentication method your SharePoint site uses. You may choose Windows Based, Forms Based, Office 365 or Web Login.

ACCOUNT

You may select the set of credentials to be used to authenticate against the site's server here. If you are authenticating against a Federated Office 365 site or using Claims authentication you need to enter your Active Directory credentials here. You will have to create a new account when adding a new site. Each account will have the following options:

AUTHENTICATION

Alias

This is required and it's just the name for the account.

Domain

A domain for your credentials may be input here. This may or may not be necessary. This information can be verified with the site administrator or your IT dept.

Username

This value Input your username here. You may use the Domain\Username or the Username@Domain format.

Password

This value Input your password here.

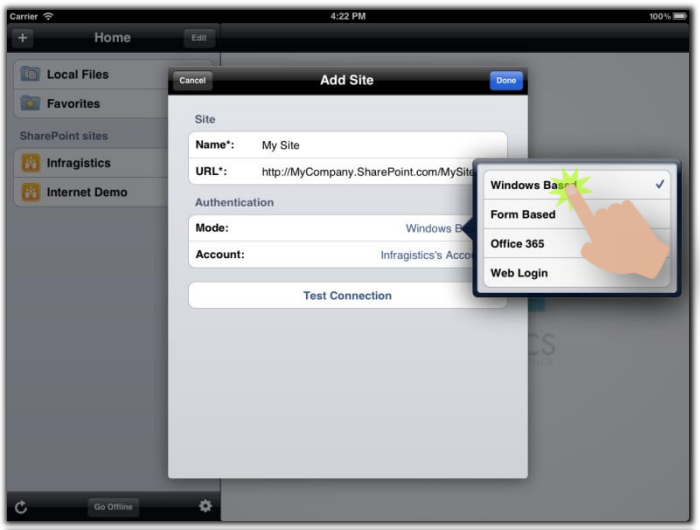
Client Certificate

If your server requires a client side certificate you can enable certificate support here. After enabled SharePlus will ask you to select the .p12 file from Local Files. This will require you to have previously copied the certificate to Local Files.

TUTORIAL

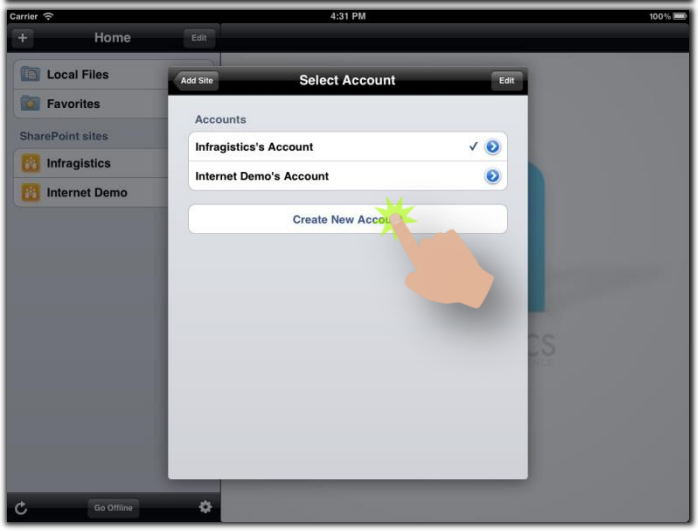
Tap the Add button at the Home Screen.

In the Add Site dialog, input a name for your site and its URL.



Select an authentication mechanism and set up an account accordingly.

Tap the Account field to select an already existing account or create a new one.

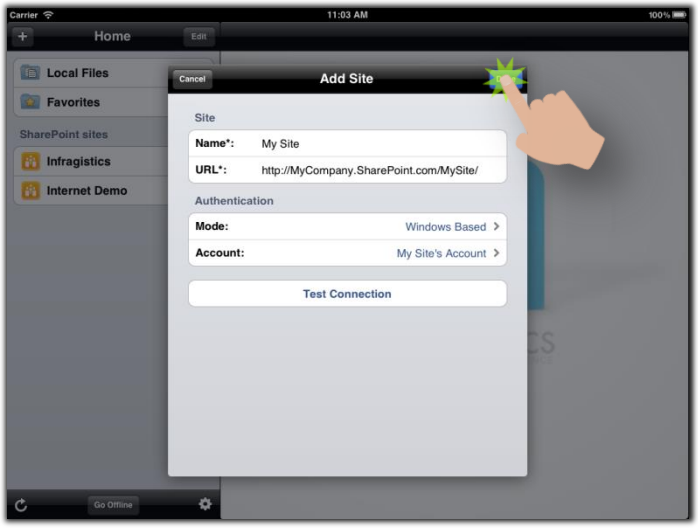


In the Select Account dialog, tap Create New Account.

Input an Alias for the account (account name), domain (if needed), username and password.

You may enable and select a Client Certificate if needed.

This account can be used as the default account for all new sites.



Once you have finished completing the login information, tap Done to save the changes. At this point you may tap Done to complete the new site set up or tap the Test Connection button to verify everything works fine and is correctly configured.

BROWSE AND MANAGE CONTENT

The main feature SharePlus presents is the ability to navigate and browse your SharePoint sites and their contents.

Navigation is very intuitive. In the left pane you can see hierarchical structure of the site being browsed: sub-sites on top, lists and libraries below. Tapping one of these elements will make SharePlus drill down in navigation (sub-sites) or display their content (lists and libraries) in the right pane.

SHAREPOINT SITE NAVIGATION

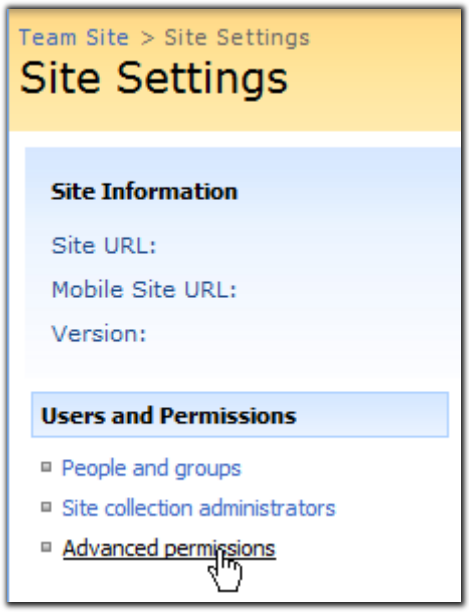
SharePlus uses web services to "know" what sub-sites you have access to, based on your credentials. This means that, in order for you to being able to browse a sub-site, you need to have access to it, or enough privileges.

THE BROWSE DIRECTORIES PRIVILEGE

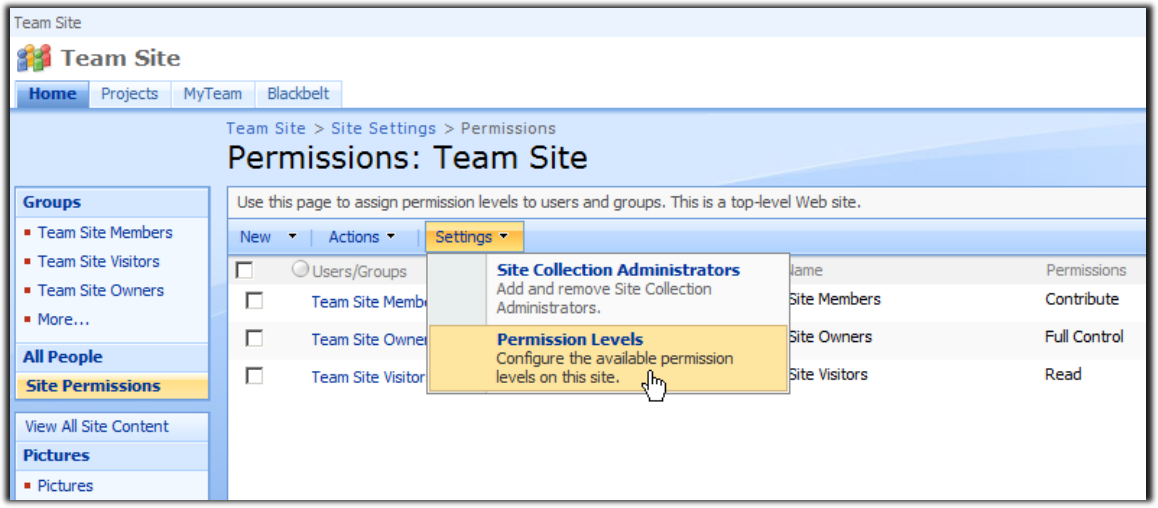
Most end users don't have to bear this in mind. The Browse Directories privilege allows users to "see" a site's sub-sites whether they have write permissions or not. If this privilege is not enabled, users won't be able to see a site's sub-sites in SharePlus, even though they could in a web browser.

If you can't see the sub-sites of a site you have just configured but you can see them in a browser then you will probably have to contact your site administrator to have him turn on the Browse Directories privilege.

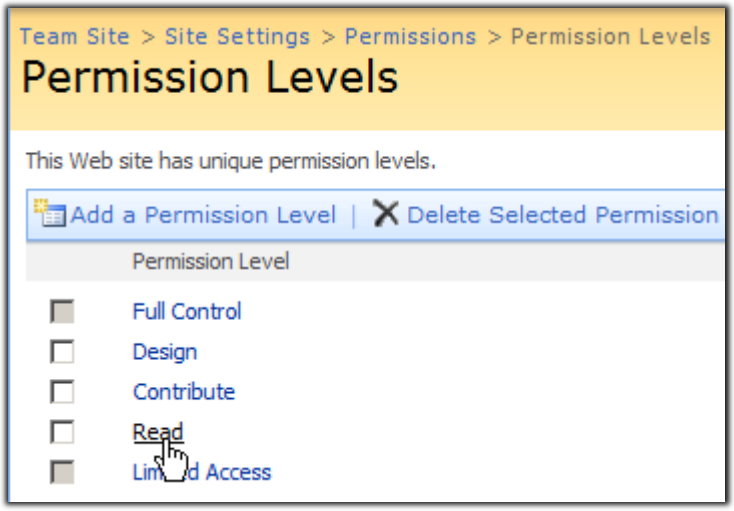
If you are the site administrator you may change this yourself:



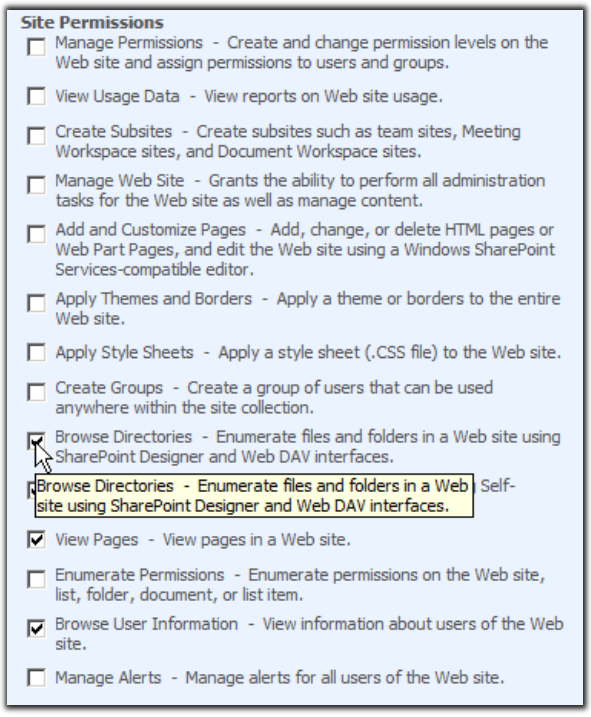
Browse your SharePoint site in a browser then go to Site Settings and click on Advanced Permissions.



Click the down-arrow next to the Settings button and click Permission Levels.



Click the Read permission level link.


Site Permissions
Manage Permissions - Create and change permission levels on the Web site and assign permissions to users and groups.
View Usage Data - View reports on Web site usage.
Create Subsites - Create subsites such as team sites, Meeting Workspace sites, and Document Workspace sites.
Manage Web Site - Grants the ability to perform all administration tasks for the Web site as well as manage content.
Add and Customize Pages - Add, change, or delete HTML pages or Web Part Pages, and edit the Web site using a Windows SharePoint Services-compatible editor.
Apply Themes and Borders - Apply a theme or borders to the entire Web site.
Apply Style Sheets - Apply a style sheet (.CSS file) to the Web site.
Create Groups - Create a group of users that can be used anywhere within the site collection.
Browse Directories - Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces.
Browse Directories - Enumerate files and folders in a Web site using SharePoint Designer and Web DAV interfaces.
View Pages - View pages in a Web site.
Enumerate Permissions - Enumerate permissions on the Web site, list, folder, document, or list item.
Browse User Information - View information about users of the Web site.
Manage Alerts - Manage alerts for all users of the Web site.

Scroll down until you see the Browse Directories option. Click on the check-box to enable it and click Save.

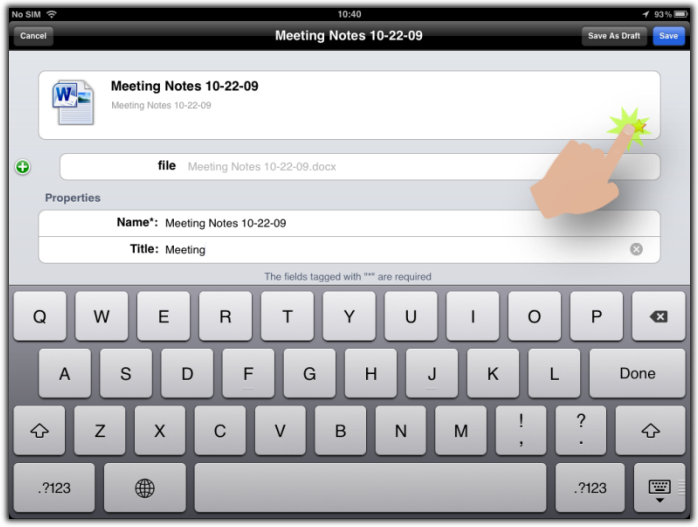
Once this has been configured you will be able to see and navigate the sub-sites of your SharePoint site.

DOCUMENTS

Documents are stored in document libraries within SharePoint sites. How these libraries will be displayed, and organized, in SharePlus depend on the SharePoint view, visualization and local group and sort settings. A document library's content will be displayed in SharePlus' right pane, also known as the content pane.

To start working with your documents you need to perform one of the actions described in the *Introduction>User Interface>Items* section of this manual.

EDIT ITEM



After tapping and holding the document's name you will be able to select the Edit Item option. The document's details will be displayed in the content pane. This is the document's metadata. The Edit Item action won't allow you to edit the document itself but the SharePoint data for it.

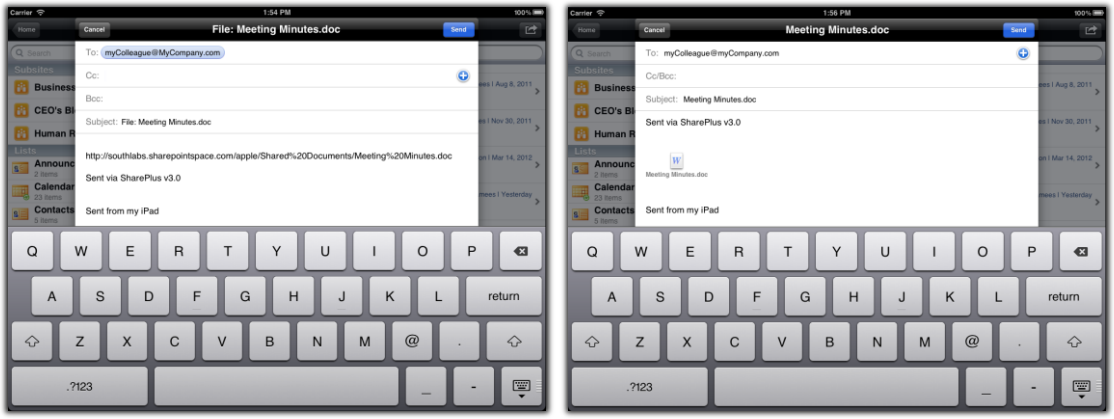
You will be able to edit the document's name and, optionally, its title. You may also replace the document with another, or modified or newer version, for example. By tapping the star button you may add or remove the document from your favorites.

Once you're done with editing the item you may tap Save to confirm, Save As Draft to save it and continue editing later without modifying the SharePoint copy, or Cancel to discard the changes.

EMAIL URL AND EMAIL DOCUMENT

These actions allow you to send the URL for the document to a colleague of yours or send the document itself as an attachment in an email message. These require you having an e-mail account already set up in your iOS device.

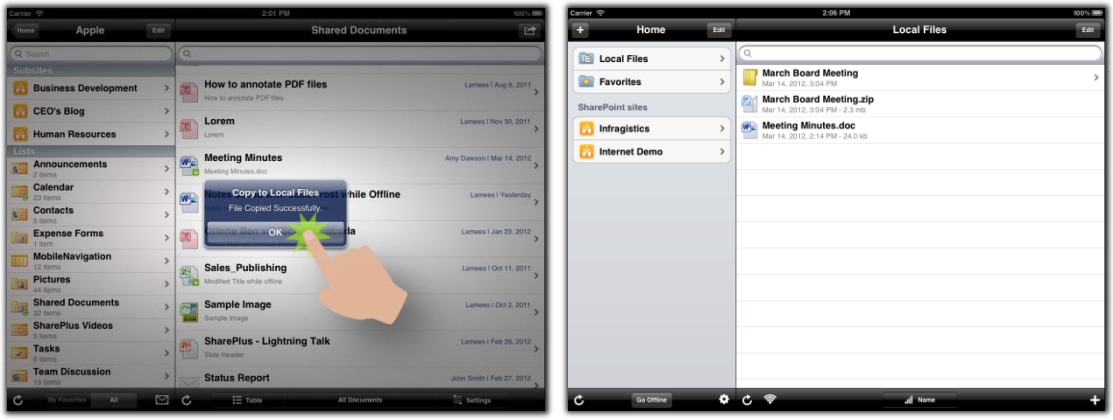
When you tap Send you will return to SharePlus. Keep in mind that the recipient, even if he has SharePlus installed in his iOS device, will be unable to open the link directly in SharePlus – it will be opened in Safari.



COPY TO LOCAL FILES

This action will copy the selected document to Local Files. When a document or file is in Local Files it becomes globally available, to upload or attach, for SharePlus.

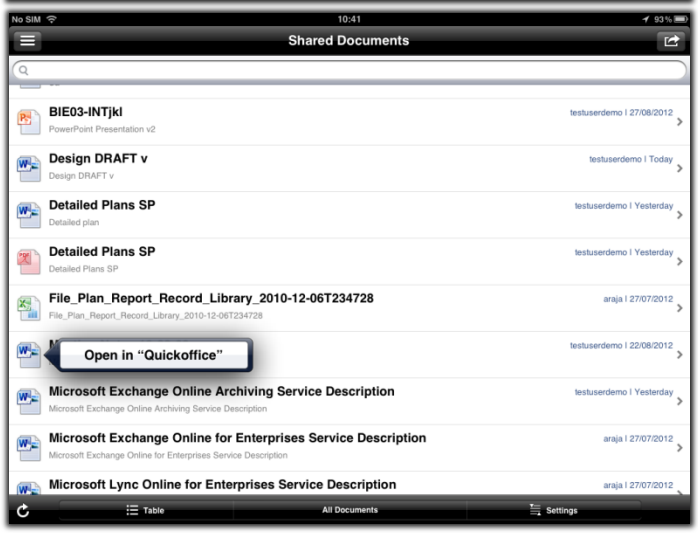
Unless something goes wrong, you will see a prompt confirming the document was successfully copied to Local Files. Tap OK to check and carry on working with your documents.

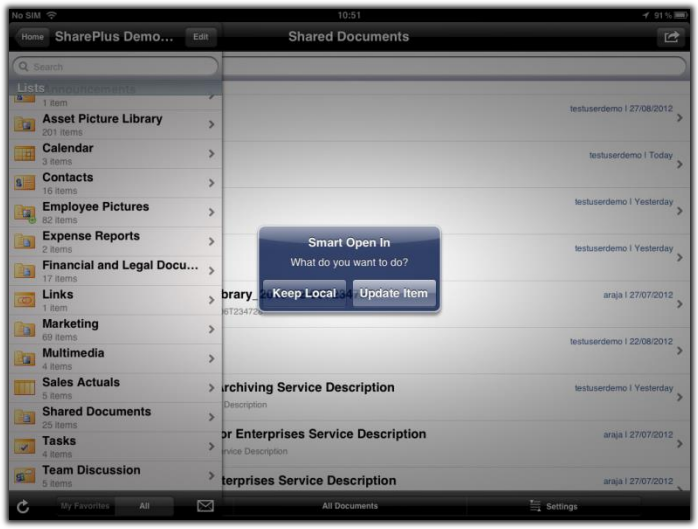


EDIT

This command is accessible after tapping and holding the document's icon. It allows you to edit the document itself, as opposed to Edit Item.

SharePlus relies on 3rd party apps to edit documents. We recommend QuickOffice PRO HD for its native integration with SharePlus, though you may use any other 3rd party office app that supports incoming and outgoing Open In Protocol.





In most cases your iOS device will already have an office app that will be able to edit your document. If not, an error message will let you know that you need to get an app in order to edit the selected document.

When an office app is installed in your iOS device you will be given the option to open the document in the default application, or select an alternative one in the Open In Menu, if any available. This menu will show all apps capable of opening the document. Please note that even though applications, like Pages or Numbers, which do support incoming Open In don't support outgoing Open In. These won't allow you to send the edited document back to SharePlus.

Once you are done with editing your document you may send it back to SharePlus. SharePlus will display a dialog giving you the option to update an already existing item or save the document to Local Files. When updating an already existing item you will have to complete/update its details before saving.

The document you just edited will be updated and synced with your SharePoint site.

For a video tutorial, please follow these links:

Smart OpenIn

Save Back in QuickOffice

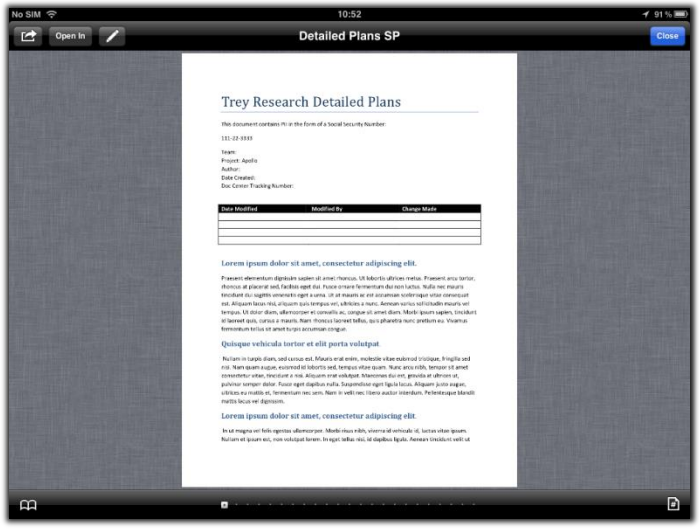
EDIT IN WEB

This option (available when tapping and holding the item's name) allows you to edit MS Office documents online, using Office Web Apps. This functionality needs to be enabled and available in your SharePoint site. Attempting to edit a document in the web with no Office Web Apps installed in you server will result in a server error.

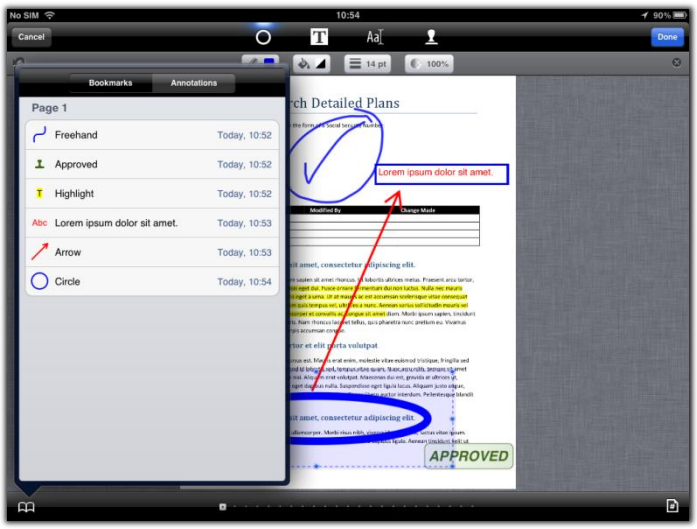
PDF Annotations

With SharePlus you can annotate PDF documents: it comes equipped with the most common annotation tools such as Shape, Text Highlight, Text Notes and Stamps. Each one of these tools has a rich set of option which we'll see in detail further on in this manual.

SharePlus supports overlay annotations in PDF documents. This means that non-flattened annotated PDFs will be properly displayed in SharePlus' viewer. You may also edit or delete previously saved annotations.



You will be able to navigate through bookmarks and annotations as well as navigate the document. To navigate your PDFs you can either swipe left or right to go back and forth, respectively; or scroll up and down to change pages.



In order to start annotating you PDF document, tap its icon in the list view. Once in the document's preview, tap the pen button for the annotation tools to be displayed.

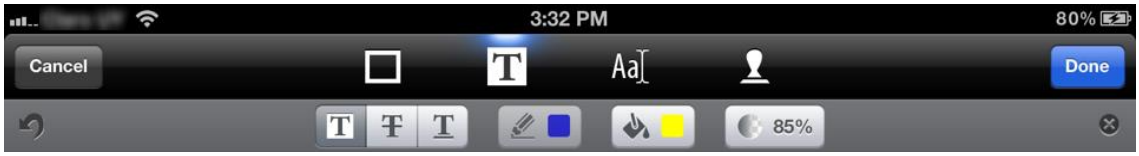
SHAPE TOOL

The Shape Tool allows you to create squares, circles and arrows, among other shapes, in different colors and transparency.

Once you've chosen what shape, color, line weight and transparency you want your shape to have, tap and drag anywhere in the document to draw the shape. To finish, lift your finger. You may create as many shapes in a row as you need. Tapping anywhere in the document will dismiss the tool and allow you to carry on navigating or select, the same or, another tool.

This and the rest of the tools are undoable by tapping the "Undo" arrow.

TEXT HIGHLIGHT TOOL

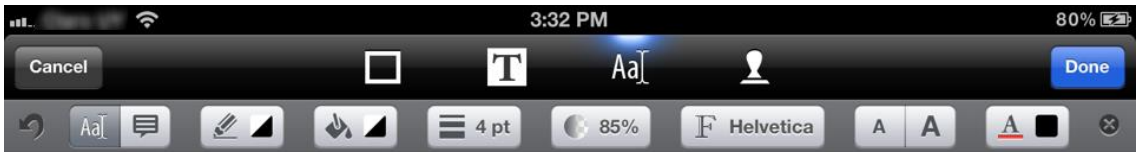


The Text Highlight tool allows you to highlight, strikethrough or underline text in PDFs in different colors and transparency.

Once you've set the tool as needed, tap and drag over text to mark it. Lift your finger to finish. You may continue highlighting text or tap anywhere on the document to dismiss the tool.

Remember that some PDFs may contain text that is actually an image. SharePlus can't highlight this type of "text".

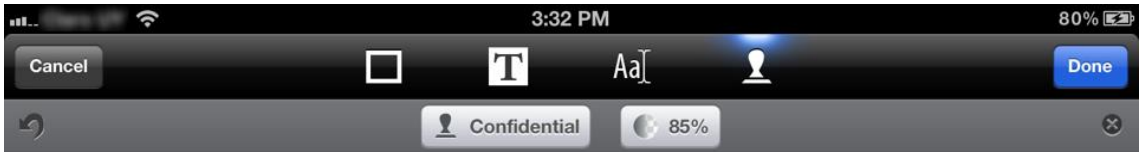
TEXT NOTE TOOL



The Text Note toll allow you to either add sticky notes on the PDF document or add text notes in specific places. You may choose different border and background colors for the note; different border size; transparency; font type, size and color.

Tapping outside the note will dismiss the tool and let you continue working with your PDF.

THE STAMP TOOL



The Stamp Tool comes with preset stamps: Approved, Not Approved, Draft, Final, Completed, Confidential, For Public Release, Not For Public Release. You can set the transparency for the stamps and, once it's placed, its size.

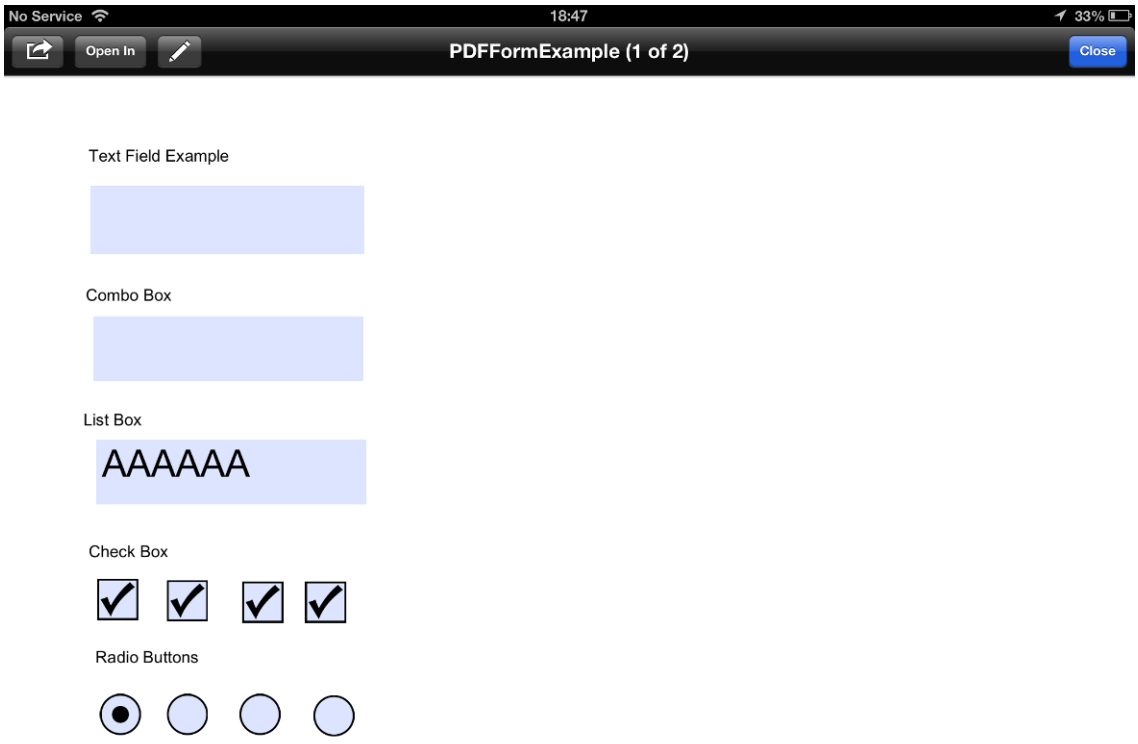
The tool is auto dismissed upon each stamp.

Once you have finished with annotating your document you will have to tap "Done" to save the changes. You will be given these options:

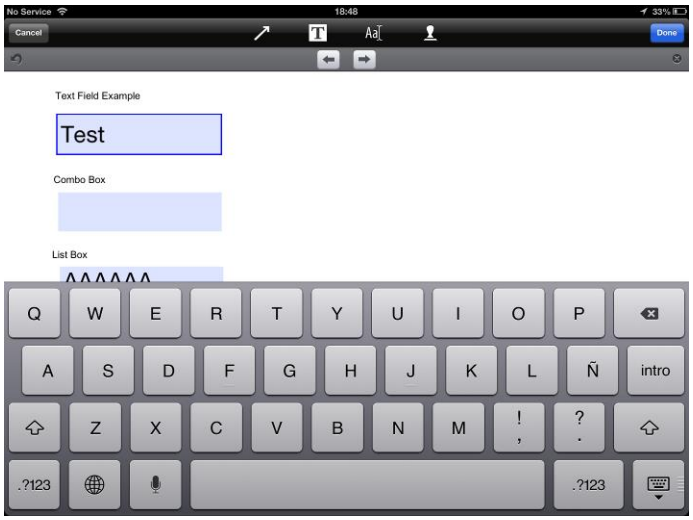
- **Save:** will save and overwrite the current document in SharePoint
- **Save as Draft:** will save a temporary copy that will allow you to continue editing later, without modifying the SharePoint copy.
- **Save to Other Location:** you will be able to choose another place in your SharePoint site to save the edited copy of the current document.
- **Copy to Local Files:** will copy the edited version to Local Files. The SharePoint version will remain intact.

PDF Forms

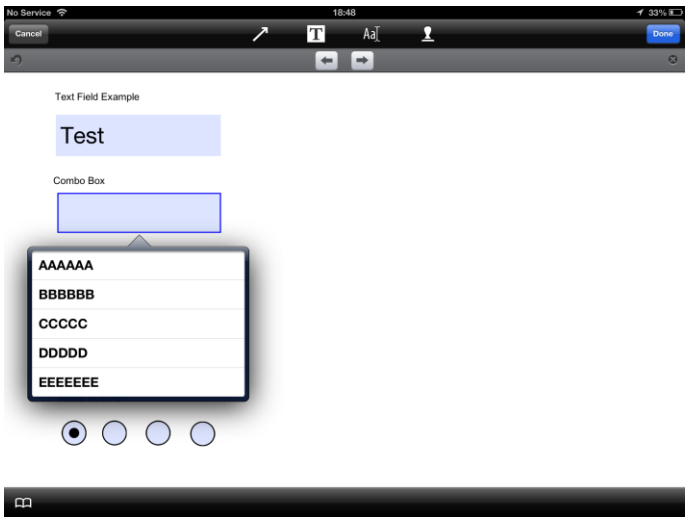
Now that SharePlus supports viewing and filling PDF forms you can simply browse the document library that contains the form and tap its icon to view it and tap the pencil icon as if you were going to annotate the PDF.



Form fields will be highlighted in light blue for you to easily identify them. In order to edit a particular field, you just have to tap it. According to what type of field it is, the corresponding controls will be displayed.

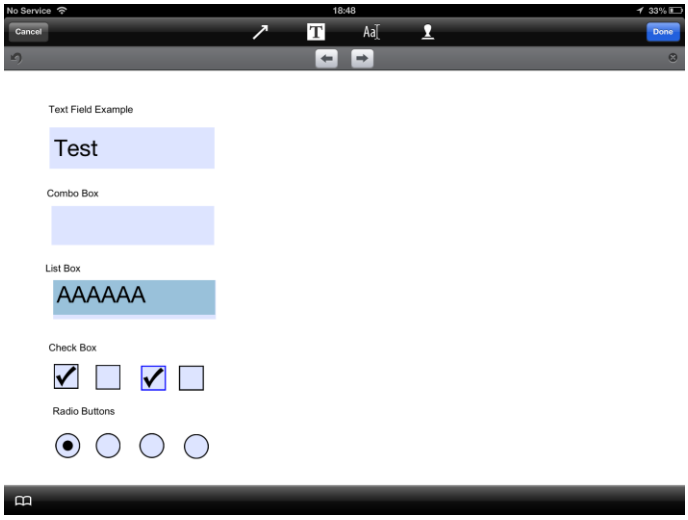


You can have Text Fields, in which, after tapping, you will be able to input text using the on-screen keypad or an external or Bluetooth keyboard.



In combo boxes you'll see iOS native drop-down dialog which will let you choose one option.

List boxes look similar but you may select more than one option in these. You will see a check mark to the right of all items you've selected.

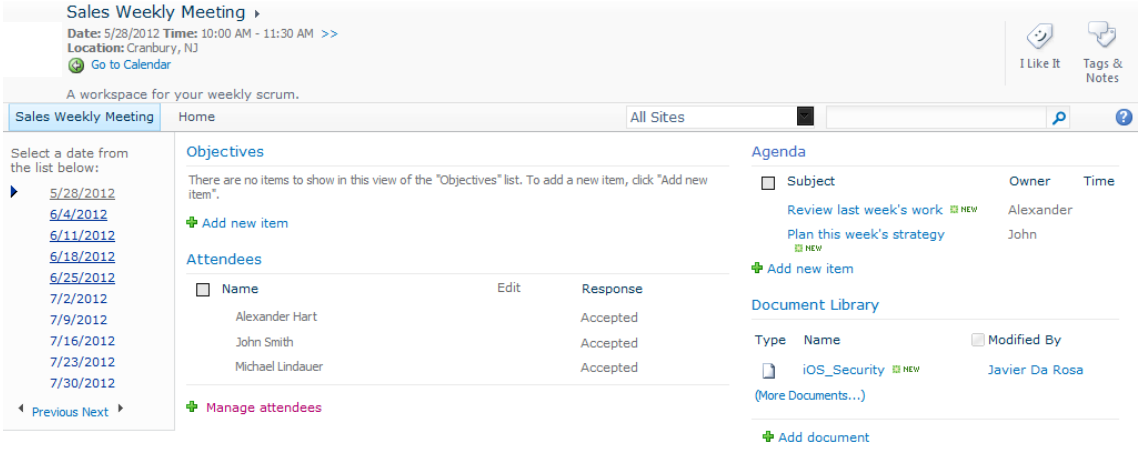


Finally you will be able to mark or unmark check boxes and radio buttons. Check boxes allow multiple selections and radio buttons allow only one, in general.

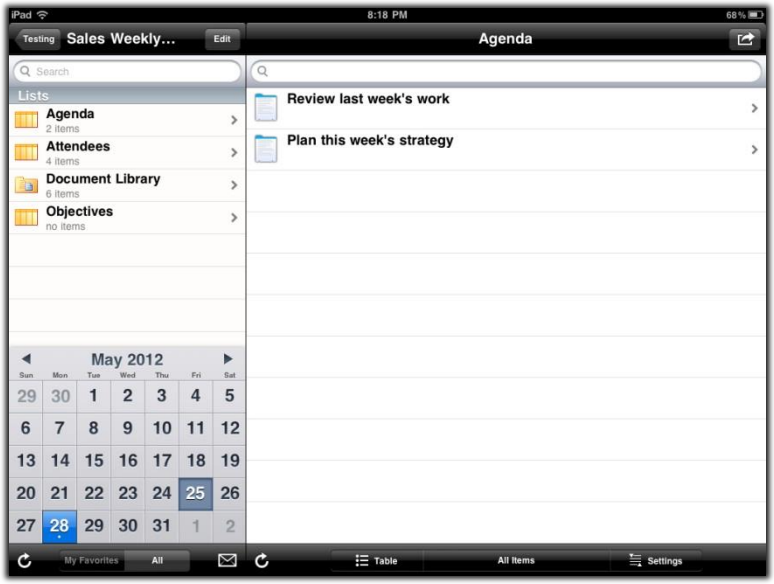
Once you're done with filling your form, you may tap DONE to save it to the server, as draft, another location or to Local Files.

MEETING WORKSPACES

Meeting workspaces are SharePoint site templates used to organize structured meetings. They are regular SharePoint sites but have a special design that helps you organize your meetings:



Because Meeting Workspaces have this special design they can't be treated like regular sites by SharePlus. For this reason Meeting Workspaces have a dedicated view in SharePlus that makes browsing a workspace an intuitive experience:



You can browse the different instances of a meeting, if it's a recurring event, in the calendar below the Agenda, Attendees, Documents and Objectives lists.

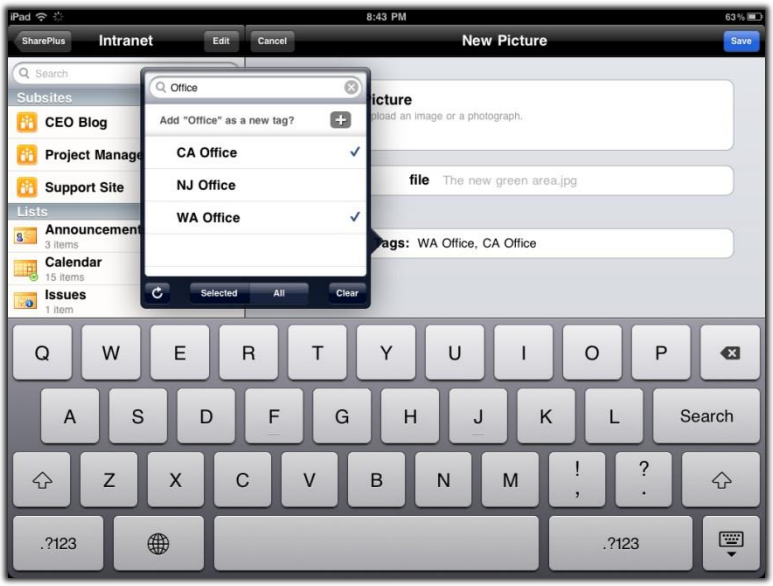
Managing the Agenda, Attendees, Document Library and Objectives lists works the same as for other lists.

MANAGED METADATA & LOOKUP FIELDS

MANAGED METADATA

Managed Metadata is a collection of centrally managed terms that you can define and use as attributes for your items in SharePoint.

When adding a new item, you can select, depending on the managed metadata field settings, one or multiple terms and add new ones as you search for existing terms:



As you will notice you can also refresh the term set (just in case new terms were added while you were choosing); filter by the selected terms or all terms and clear your selection.

Once you've selected the terms you wanted you can carry on working with your item.

LOOKUP FIELDS

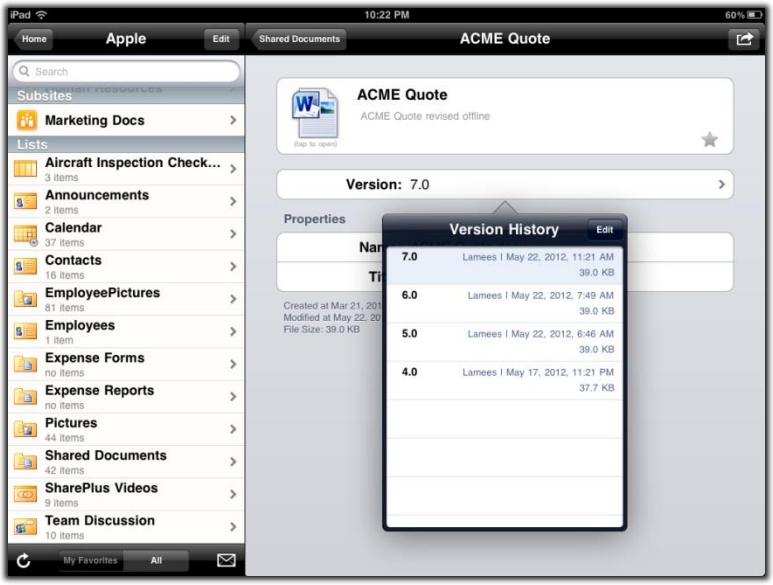
These fields take their value from other columns in the same list or library and they can contain from a couple to hundreds of thousands of values.

Navigating these lists of values is easy with SharePlus, when creating or editing an item. Values are paged and can be searched for inside the lookup field bubble:

VERSIONS

Version-enabled items can keep a history of minor and major versions, depending on the list settings; this also applies to documents as well.

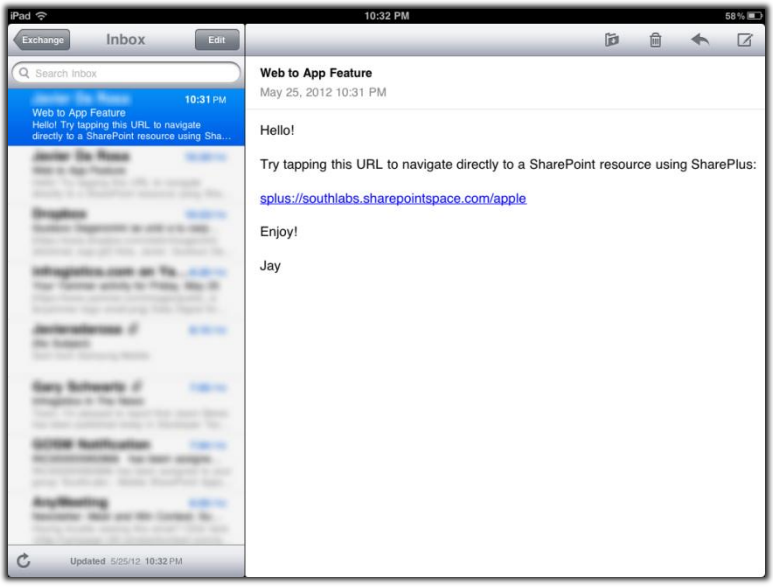
In SharePlus you can simply tap a version-enabled item and see the previous versions:



By tapping the Edit button in the Version History bubble you may also delete and restore older versions of a document or field:

WEB TO APP (URL SCHEMAS)

SharePlus now supports URL Schemas, this means that you can launch SharePlus and have it navigate to a specific location or resource with a link from, virtually, any app in your iPad or iPhone. The URLs start with splus:// or spluss:// (for secure channels) and are followed by the resource's URL without the http or https protocol:



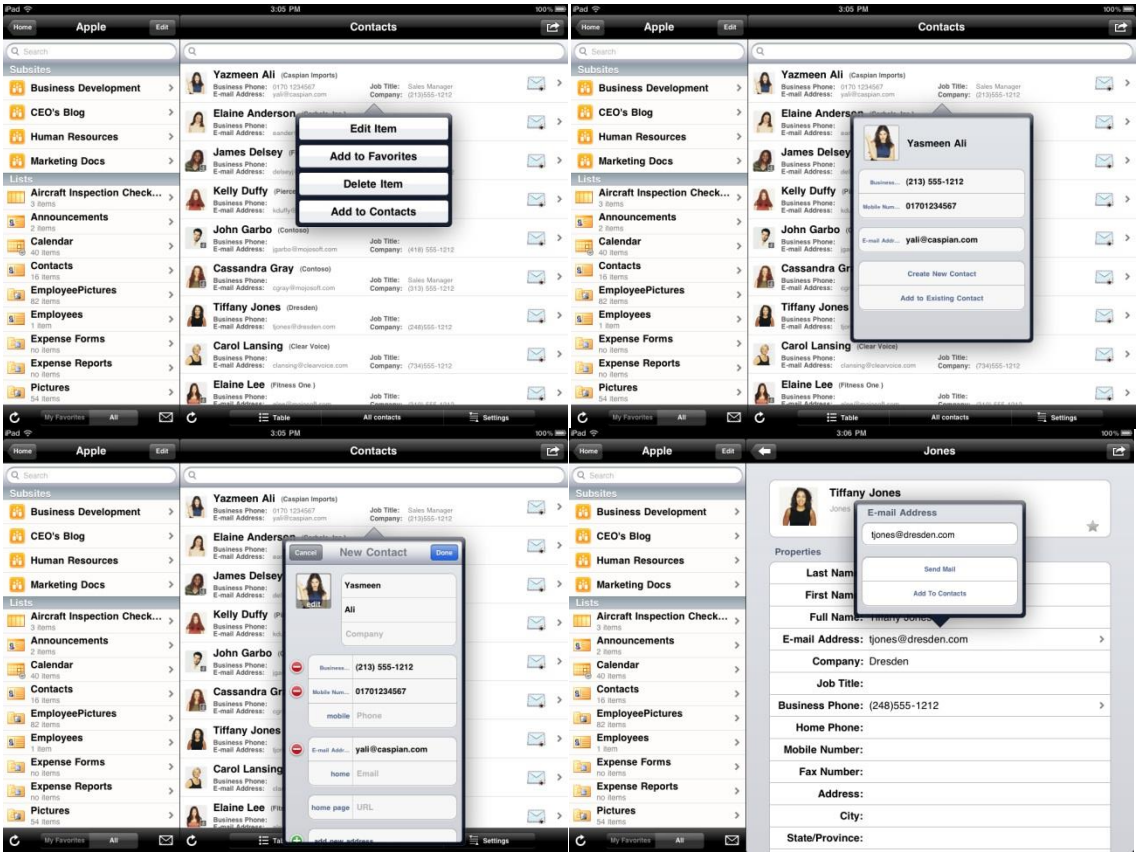
If you have already set up the site in SharePlus, the app will simply take you to the resource if it is an item or document – or navigate to the location if it is a list or sub-site:

If the site in which the location or resource is located is not set up in SharePlus yet, you will be given the option to set up the site. Of course, you will need to set up the account for the site as you would do normally when setting up a site from scratch – but you will have the site name and URL already added:

ADD TO CONTACTS FROM ANY PHONE/EMAIL/CONTACT

You can now add your SharePoint contacts to your iPhone or iPad contacts. You can even add a phone number or an email address!

Importing contact information from SharePoint to your iPhone or iPad is simple and easy:



TASKS

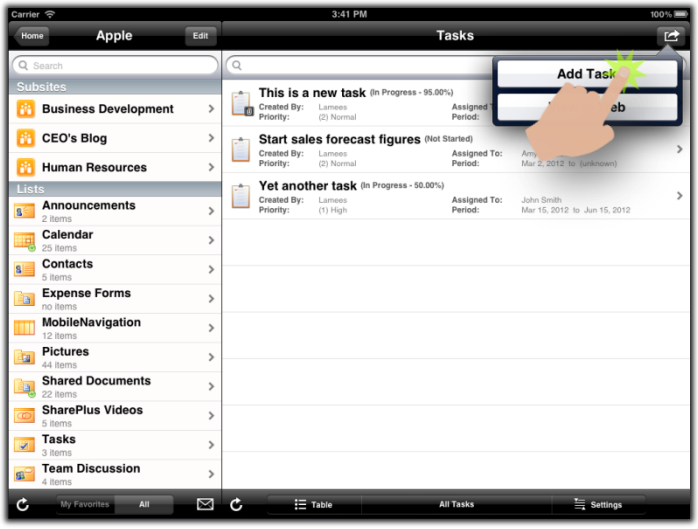
Tasks are stored in task lists within SharePoint sites. How these libraries will be displayed, and organized, in SharePlus depend on the SharePoint view, visualization and local group and sort settings. Like documents, tasks will be displayed in the content pane.

To stark working with your tasks you need to perform one of the actions described in the *Introduction>User Interface>Items* section of this manual.

EDIT ITEM

This action will allow you to edit a task's information such as attachments, title, priority, status, etc. You may also tap the Star icon to add or remove the item from your favorites.

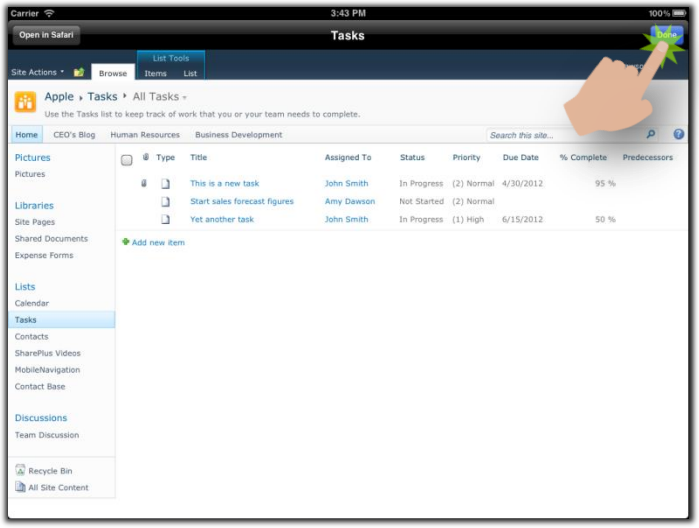
ADD TASK



By tapping the Actions button in the top-right side of the content pane you can add new tasks to a task list. Like when editing a task, you can add attachments and modify all the columns for the new task item.

VIEW IN WEB

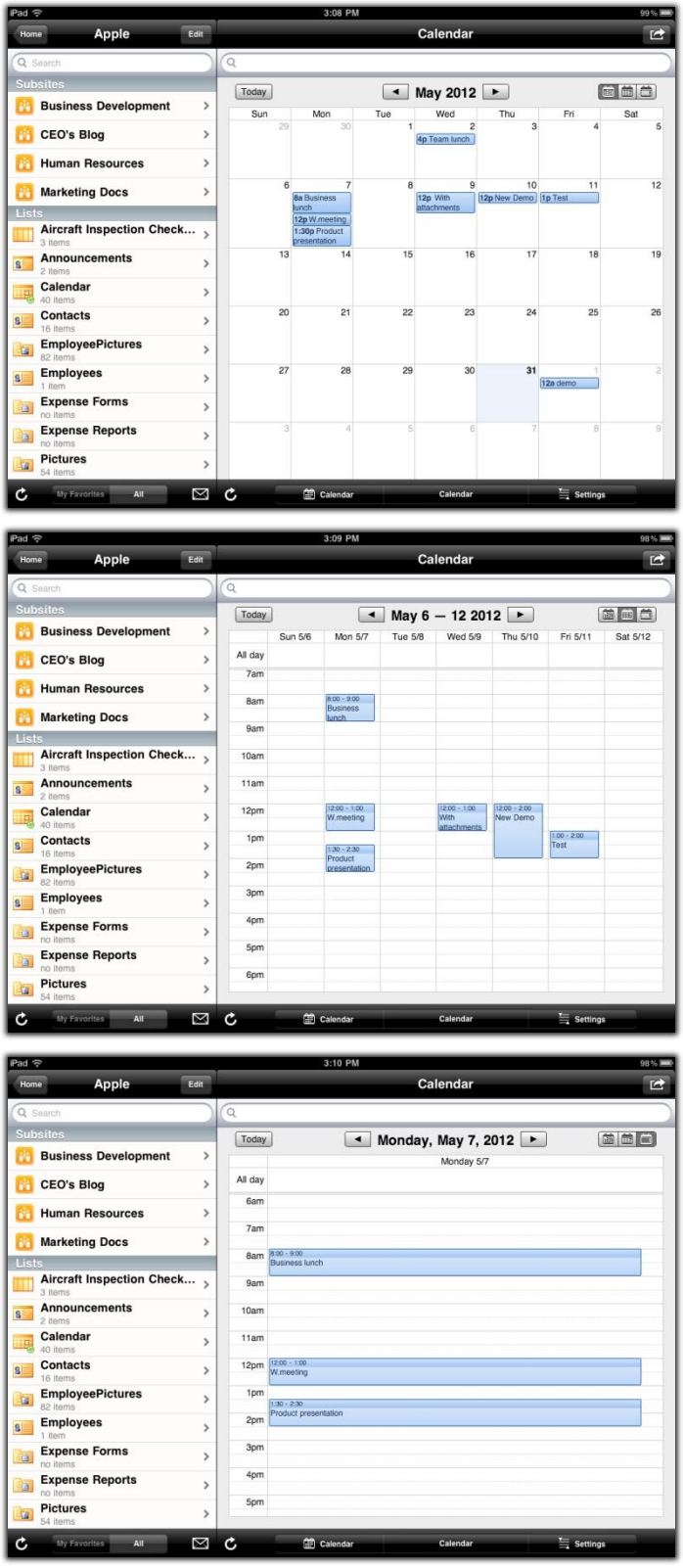
In the Actions button you can also choose to view the task list in a web browser.



To exit the web view tap Done. The Open in Safari button will open the current location in your iPad's/iPhone's browser. This will send SharePlus to the background but won't exit the web view.

CALENDARS

Calendars now have a new calendar view that allows you to see your calendar by month, week and day:



The compact calendar view was kept as well.

Now events are shown in a way that they can span across days and hours:

Besides being able to add a calendar entry or view the calendar in a web view by tapping the Actions button, you can also tap a blank part of the calendar to add a new event or view in web:

In order to scroll the calendar up and down you need to scroll with two fingers. To jump directly to the current date, tap the TODAY button.

The Compact calendar visualization displays the whole month with dots below the days that have calendar entries. In iPad you will see, below the calendar, all the entries for a selected day. In iPhone/iPod touch you will see a list of calendar entries after you tap a day which has a dot marker.

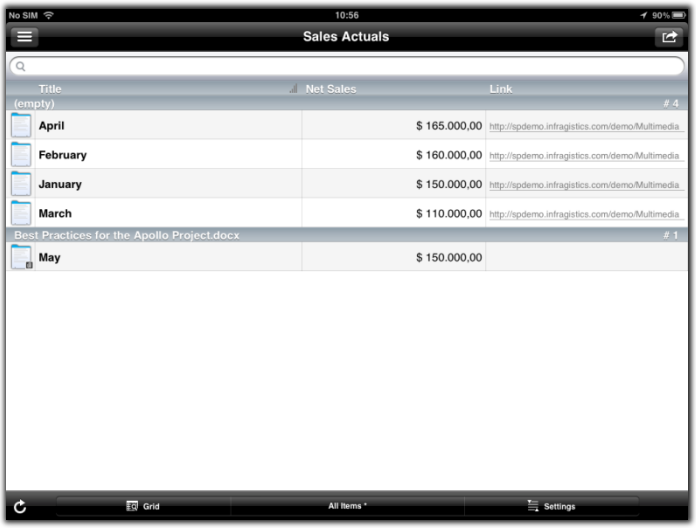
Even though other visualizations are supported (list and grid view) these may not be as intuitive as the calendar visualizations. Calendars also support SharePoint views with group and sorting settings.

GRID VISUALIZATION

SharePlus now has an improved grid view which introduces new functionality and better performance.

The grid view is like a spreadsheet view in which you have items represented in rows and columns.

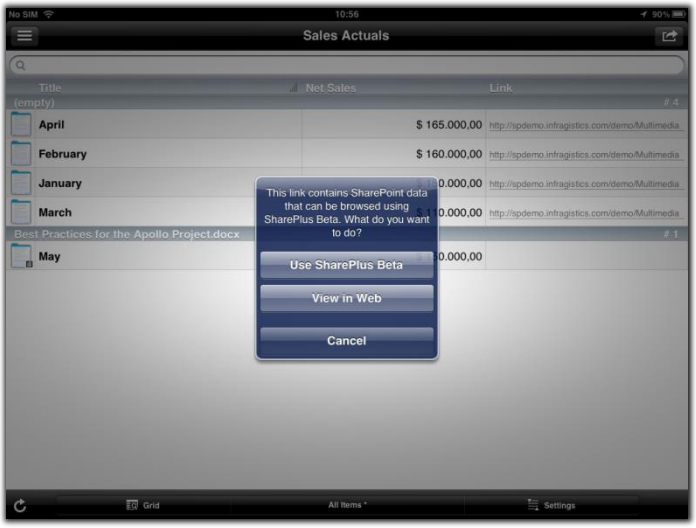
SharePlus' grid allows you to sort your items by a particular column: tap the column's header to sort in ascending order and tap again to sort in descending order.



In order to remove the sorting options by a particular column go to Settings and tap Reset to restore the view's default group and sorting options or Clear to remove all options.

The grid view supports grouping like all other list visualizations in SharePlus.

Tapping a link in a column will either navigate to a SharePoint resource, if the site is configured, or open a web view to render the web content.



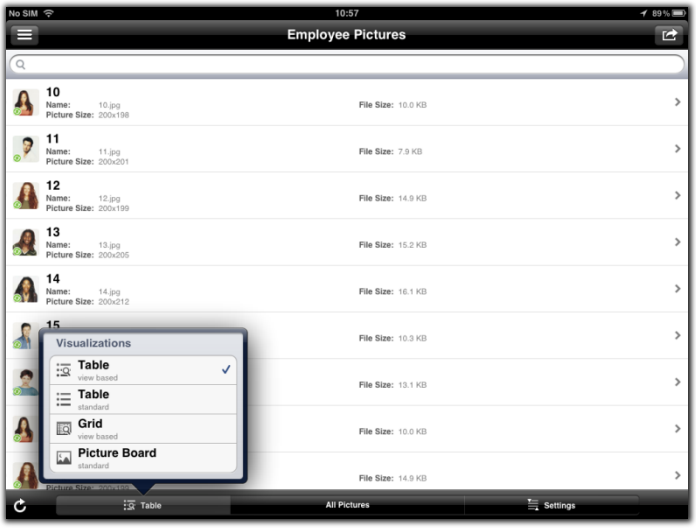
When a phone or email is tapped you will be able to call, email or add that person to your contacts.

In order to open multiple documents or item attachments in SharePlus' tabbed viewer swipe left with 2 fingers to go into the selection mode; select multiple items and tap the Open button.

VIEW BASED TABLE VISUALIZATION

This new visualization looks the same as the Table Visualization but uses the SharePoint view's first 4 columns to customize what data is displayed along with the title in the list view.

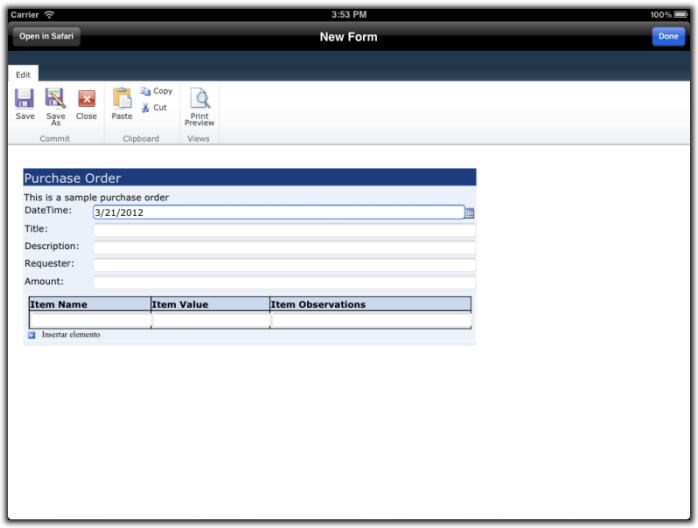
This, like all other visualizations, supports group and sorting options.



INFOPATH FORMS AND REPORTS

INFOPATH

SharePlus supports displaying a web view of InfoPath forms and adding new ones based on a form template. Viewing and adding new forms require SharePlus to be online. No offline support is provided for form libraries.

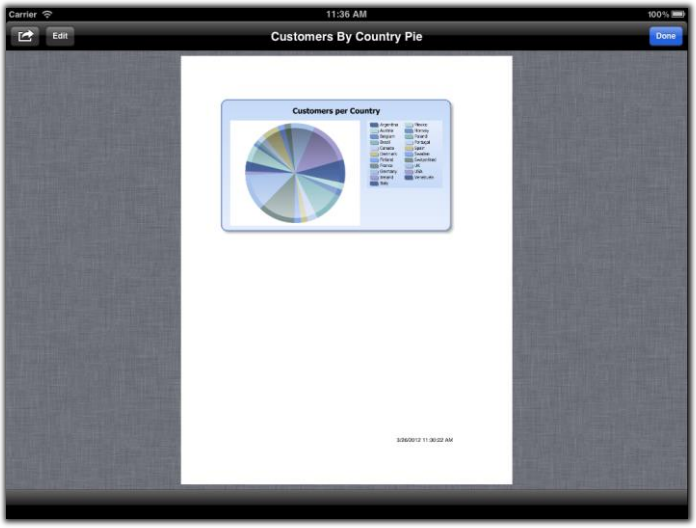


Your SharePoint server needs to have InfoPath Forms Services enabled and correctly configured in order for SharePlus to be able to render a web view of the form. For more information on how to configure it refer to this article.

REPORTS

SharePlus' ability to render reports depends on your SharePoint server: it has to have Reporting Services enabled.

You can view reports PDF versions of your reports with SharePlus.

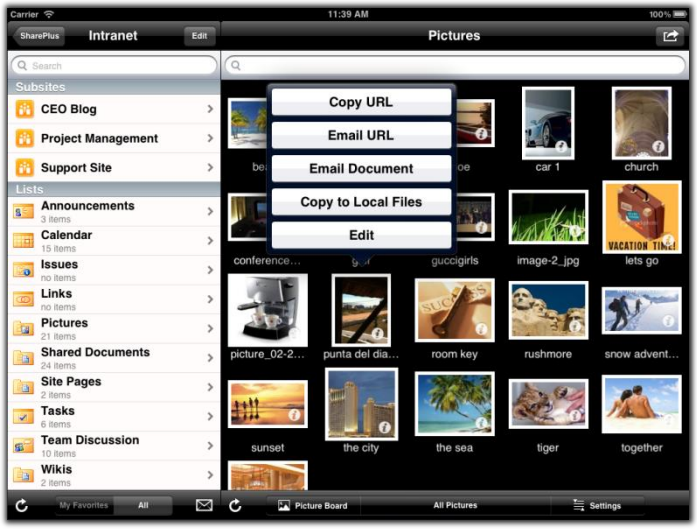


PICTURES

Pictures, like calendars, have a particular visualization option which is the Picture Board. This is the most intuitive way of browsing your pictures and provides as much functionality as a traditional SharePoint view.

Tapping the (i) icon in the picture will display the picture's information. In this view you may add the picture to your Favorites, edit the item, check out and delete it.

You may also tap and hold the picture to being able to copy or email its URL, send it by email or to Local Files, open its information in edit mode.



In order to select multiple pictures to open them in SharePlus tabbed viewer you need to swipe left with 2 fingers to enter into the select mode, check the pictures you want to open then tap the Open button.

OTHER CONTENT

SharePlus supports the entire out of the box SharePoint scope of content. This means that the standard actions' availability really depends on what type of item you are working with. For example, you can only send by email actual documents: calendar entries can't be sent.

EDIT MODE

AT THE HOME SCREEN

At SharePlus' home screen you can see, in the left pane, Local Files, Favorites, and a list of all your sites. In the top bar there's a [+] button and the Edit button. The former is for adding new sites and the latter is to enter the Edit mode.

When in Edit mode, SharePlus' home screen will display your SharePoint sites only. Each one of them will have a red circle with a white horizontal line to the left and a "grab" marker (three horizontal lines) to the right.

The red circle can be tapped to delete the site. Once tapped, the horizontal line will become vertical and a Delete button will replace the grab marker. Tapping delete will remove the selected site from SharePlus and delete all cached and locally store data and credentials.

By tapping and holding the grab marker you may change the order in which your sites are displayed in the home screen.

You may also edit the accounts associated with your sites by tapping the Accounts button in the bottom bar. This action will bring up the Manage Accounts dialog in which you will be able to edit the credentials for each one of your sites; or create a new account or set of credentials.

To exit edit mode, and save the changes, tap Done.

AT LOCAL FILES

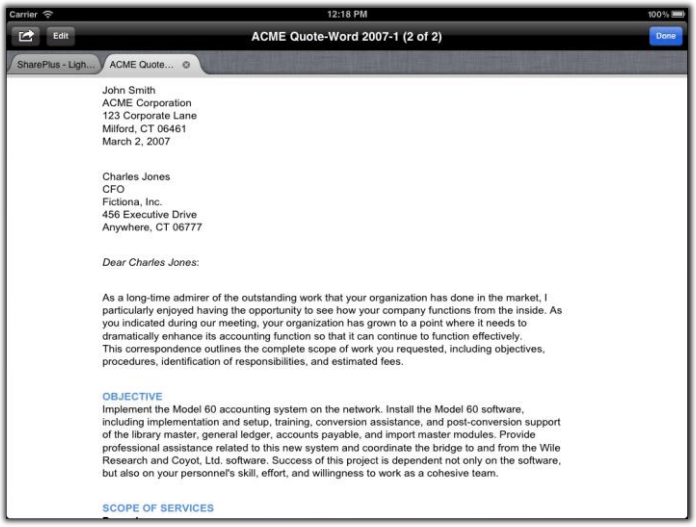
In Local Files, you will see two buttons at the top bar. To the left, the Home button will take you back to the home screen. To the right, the Edit button will take you into the edit mode.

Editing Local Files content has several different options. Each file and folder will have an empty check box to the left. You can select one or multiple items by tapping this check box. Actions such as View, Delete, Move To and Compress will apply to all selected files. The View action is not available for folders.

OPEN

When one or more files are selected you can tap the Open button to open them all in a tabbed viewer which will allow you to view all the selected documents organized in different tabs. You can swipe through a document pages and once you reach its end another swipe will switch tabs to the next available document.

This viewer will provide all features available for the regular viewer (Edit, Open In, Email, and Print).


Carrier
12:18 PM
100%
Edit
ACME Quote-Word 2007-1 (2 of 2)
Done
SharePlus - Ligh...
ACME Quote...
John Smith
ACME Corporation
123 Corporate Lane
Milford, CT 06461
March 2, 2007
Charles Jones
CFO
Ficticna, Inc.
456 Executive Drive
Anywhere, CT 06777
Dear Charles Jones:
As a long-time admirer of the outstanding work that your organization has done in the market, I particularly enjoyed having the opportunity to see how your company functions from the inside. As you indicated during our meeting, your organization has grown to a point where it needs to dramatically enhance its accounting function so that it can continue to function effectively. This correspondence outlines the complete scope of work you requested, including objectives, procedures, identification of responsibilities, and estimated fees.
OBJECTIVE
Implement the Model 60 accounting system on the network. Install the Model 60 software, including implementation and setup, training, conversion assistance, and post-conversion support of the library master, general ledger, accounts payable, and import master modules. Provide professional assistance related to this new system and coordinate the bridge to and from the Wile Research and Coyot, Ltd. software. Success of this project is dependent not only on the software, but also on your personnel's skill, effort, and willingness to work as a cohesive team.
SCOPE OF SERVICES

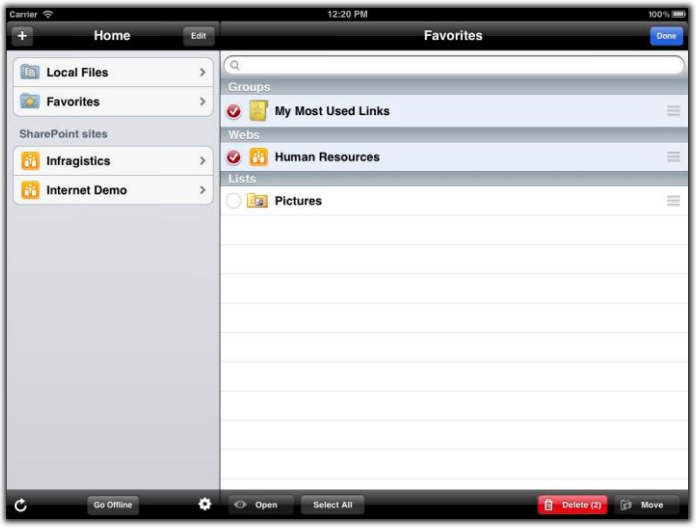
MOVE TO

The Move To action allows you to move files and folders to another location in Local Files. Once all the items you need to move are selected, tap the Move To button and select the destination folder in the explorer-like dialog that will pop up. Tap Move Items Here to confirm moving the items to the new location.

AT FAVORITES

Favorites are organized and grouped by type of content. Next to each item, when in edit mode, a check box will show up to the left of the item and a drag marker to its right.

Marking one or more items will make one or more than one of the following actions available: Open, Delete and Move To.



Like in Local Files, documents will be rendered in a tabbed viewer, if more than one selected. For other items, such as calendar entries, tasks and announcements, the View action will attempt to open, in the same tabbed viewer, any attachment the item may have. If no attachments are available, SharePlus will display a notification stating no attachments were found.

The Delete and the Move To buttons work in the same way like in Local Files.

> **THE DELETE BUTTON WILL NOT DELETE THE ACTUAL ITEM IN SHAREPOINT. THIS ACTION WILL REMOVE THE SELECTED ITEM(S) FROM THE FAVORITES FOLDER.**

AT A SITE/SUB-SITE

When browsing your sites and sub-sites, you will see their content in the left pane. The left pane will also have an Edit button to the right of the top bar. Tap Edit to enter the edit mode.

Each sub-site and list/library will show a star icon and a drag marker to their right. Tapping the star will add or remove the item from your Favorites. The drag marker allows you to re-organize the sub-sites and lists in a non-alphabetical order.

The edit mode also allows you to edit the settings for a particular list or library by simply tapping it. The List Settings dialog allows you to set up Offline Support, set the amount of items SharePlus will bring from the server in each query and reset all cached data for the list.

To exit the edit mode, tap Done.

VIEWS, GROUP AND SORT

All lists and libraries will have a set of default SharePoint views. These are created when a list is created in SharePoint. SharePoint views (default and custom/user created) are fully supported by SharePlus.

To select a view for the current list you may tap the view button at the bottom of the content pane. This will display a list of all available views. Tap one to select it.

SharePlus also supports grouping and sorting. When a SharePoint view has group or sorting options, SharePlus will read these settings and apply them. You can locally modify these settings and include different columns and change the group and sorting criteria. Please note that changing the group and sort options in SharePlus will not modify the SharePoint view. This means your changes will be temporary and will be lost once you navigate out of the current list.

GROUP AND SORT SETTINGS

By tapping the Settings button in the bottom bar you will access the group and sort settings.

The Settings dialog has different buttons and controls that correspond to different actions:

GROUP BY

This section will contain all columns to be used as the group by criteria. Each column will have, to their right, three controls: Group, Ascending/Descending and Drag.

Tapping the Group control will remove the column from Group By. Ascending/Descending will change the order in which items are grouped. The Drag control allows you to move the column to another section or re-order them in Group By.

SORT BY

You can drag columns here to add them as a sort by criteria. Like in the Group By section, each column will have the Group, Ascending/Descending and Drag controls. They work in the same way as for Group By with the exception of the Group control that will add the selected column to Group By.

COLUMNS

Columns are all the fields you see when, for example, you add a new item. This information is retrieved from your SharePoint list. What columns are displayed here depends on what button you have selected: List or View.

List

This indicates that all columns from the current list should be available for group and sorting, regardless their visibility.

View

When this button is pressed, only those columns that belong to the selected view will be available. Columns not included in the current view will not show up here.

RESET

Makes all group and sort criteria go back to its original status.

CLEAR

This button deletes all criteria including the SharePoint view's.

AUTO APPLY

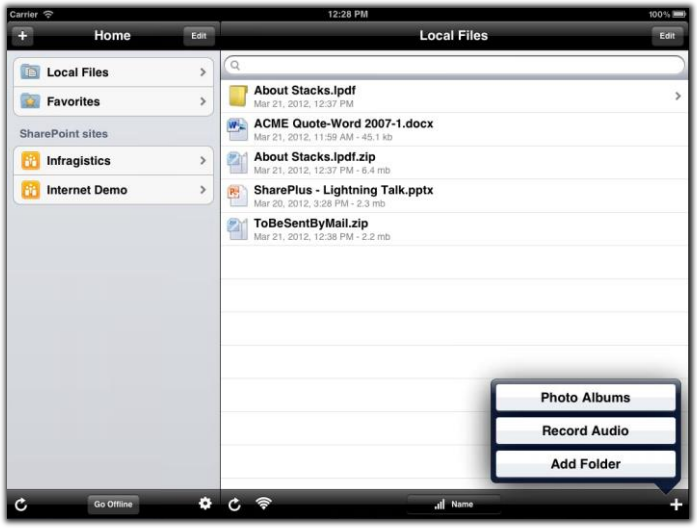
Determine whether changes should be applied as you modify the settings or not. When Auto Apply is Off you'll see an Apply button in the top-right side of the Settings dialog.

LOCAL FILES

Local Files is a SharePlus-exclusive local storage that is generally used as a buffer to store files that will be later uploaded to SharePoint, either as a new item in a document library or as an attachment.

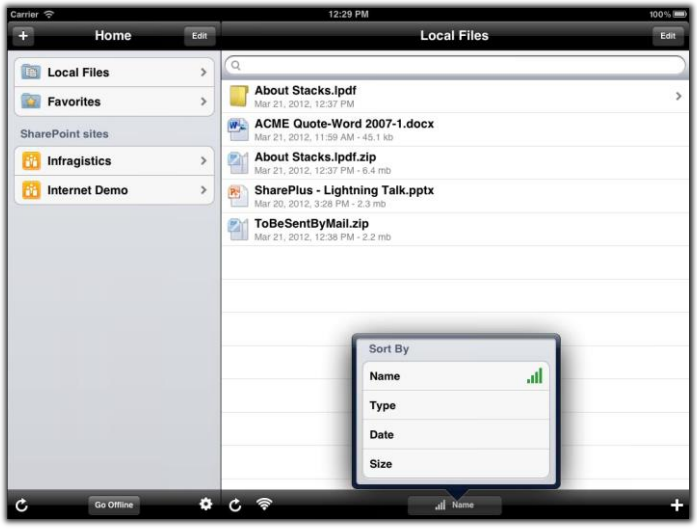
You can store files coming from you SharePoint libraries and from 3rd party apps.

ADD BUTTON



The [+] button allows you to add files to Local Files from your device's Photo Albums; by adding audio/video/photos directly from your device's camera and microphone; and add folders for you to organize your files.

SORT BY



This button lets you choose how local files will be sorted. Four options are available: Name, Type, Date and Size.

WIFI SHARING

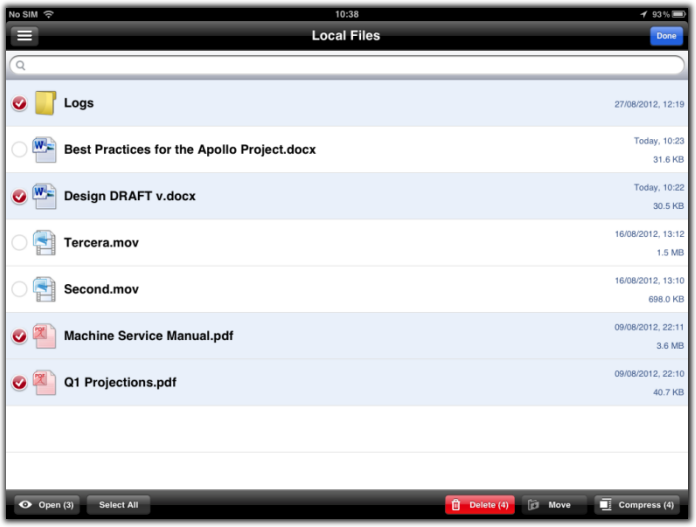
When your device is connected to a Wi-Fi network, SharePlus can share Local Files by creating a web-based interface for others to have access to your local files.

Tapping the Wi-Fi Sharing button will display a dialog in which you'll find an ON/OFF switch. When set to ON an IP address will be generated. If you input this address in a web browser, in a device connected to the same network yours is, you will be able to see your Local Files and manage them.

Once you're done, either close the Wi-Fi File Sharing dialog or set the switch to OFF.

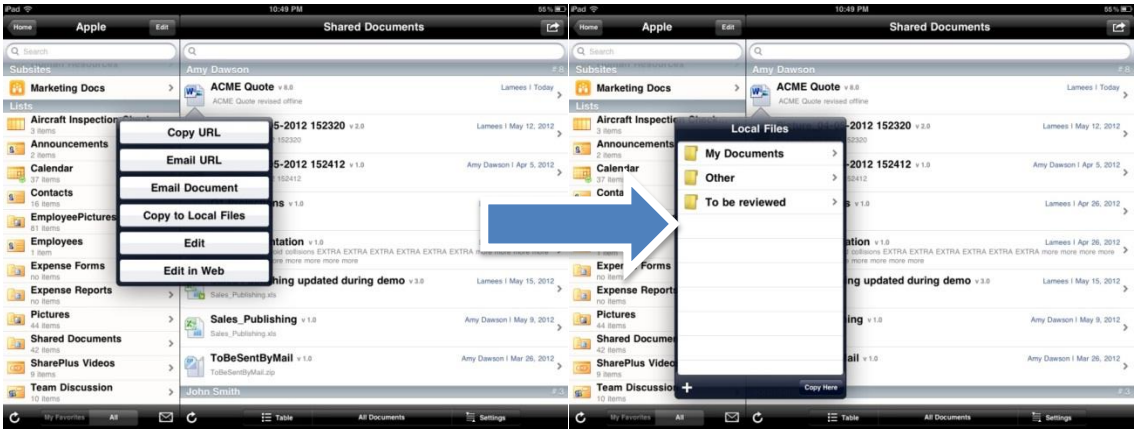
SELECT MODE

You can swipe left with 2 fingers in Local Files to go into the select mode. Check one or more items and Open them in a tabbed browser, Delete, Move to a folder or compress into a ZIP archive.

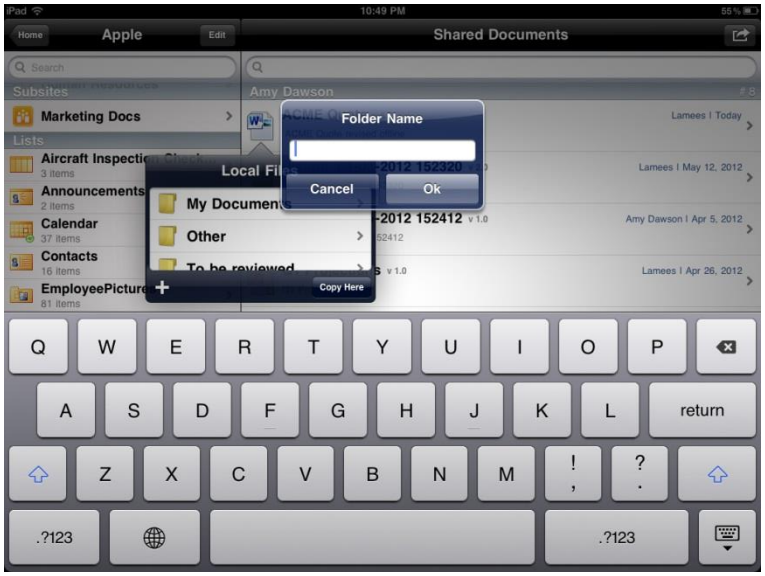


COPY TO LOCAL FILES

Copy to Local Files has been improved and you can browse its folder structure and decide to what folder you want to copy your files:



By tapping the [+] button you can add new folders before copying the document to Local Files:



FAVORITES

At SharePlus' home screen you will see, above your SharePoint sites, the Favorites folder below the Local Files.

Favorites can also be browsed by site/sub-site.

THE FAVORITES FOLDER

This folder's content will be displayed in the content pane. Favorites will be organized in: Groups, Webs, Lists, Folders and Items.

Besides the Edit mode, you can also add groups to better organize your favorites. To add a group tap the [+] icon, input a name for the new group and tap OK to confirm.

Once you have created a group, you will be able to, in the Edit mode, move your items to this group. You can have as many groups as you may need.

It is very important to bear in mind that, when browsing your favorites, when tapping items and lists, will open the items' details and the lists' content, respectively, in the content pane. You will be able to go back to favorites. When a site or sub-site is tapped SharePlus will navigate to that location (site's content in the left pane) and keep the Favorites' content in the right pane.

SITE BY SITE FAVORITES

Besides the central favorites location you can see the favorites for a particular site if you tap the My Favorites button at the bottom of the left pane. This will make SharePlus show only your favorite lists and sub-sites for the current site, in the navigation pane. To change to all lists and sub-sites, tap the All button next to the My Favorites button.

OFFLINE SUPPORT

SharePlus Pro provides the ability to cache information locally in the device, allowing you to access your SharePoint sites when you don't have an internet connection. It even supports introducing changes, adding new items, or modifying existing ones while offline and have those changes synchronized back automatically once connected again. This means that you could read a document stored in SharePoint when out visiting a client, or a patient, for example, regardless where that client is, and what network connectivity is like at his location. Even gathering information onsite as insurance agents would do, for example.

The granularity level to configure offline support in SharePlus is the list. Since some lists may contain several gigs worth of content, for performance and storage efficiency reasons, SharePlus provides different options to fine tune what and when to synchronize.

The first option in this configuration is whether to enable offline browsing for a particular list or not. By default this is false for all lists, and no content is copied to the device. To be able to navigate contents while disconnected the offline support must be enabled for a list, and each list is configured separately.

OFFLINE CONFIGURATION OPTIONS

SYNC MODE

The synchronization mode can be carried out in one of two ways. Only copying what has been browsed while online – only files which were actually browsed will be copied; or either run as a silent background process that copies the list content while the app is active and the device online – this mode is called "Background". This sync process is triggered if the app is idle for more than 30 seconds, and requests pages of list items to the SharePoint server to store them locally. After each page is stored, it checked if the app remained idle and if it did, it continues to synchronize.

SYNC LIST VIEW

The contents of a list are copied according to one SharePoint List View definition that can be selected with this option. This means filters can be defined at the SharePoint list view level, and will be taken into account in the sync process, for example the synchronization could be configured with a List set to display only the documents modified in the last seven days. This option can optimize the sync process, caching only the relevant documents, and not all the contents.

ONLY WIFI

This option enables the background process to be run only in presence of wireless network connectivity. This configuration option doesn't have an effect if the Sync Mode is set to "Browsed".

DOWNLOAD DOCUMENTS

This option allows disabling document downloading in the sync process. If set to true only list items information is cached.

MAX DOCUMENTS SIZE

This option filters the downloaded documents by size, downloading only documents with less size than the value specified.

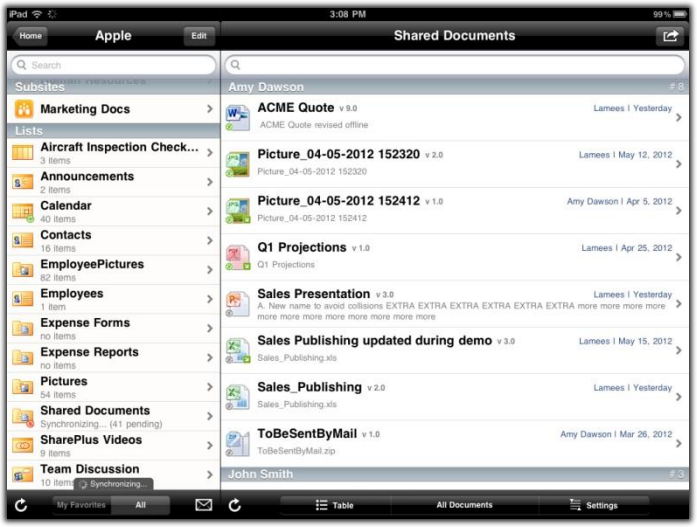
QUERY PAGE SIZE

This value specifies the number of items per page requested to the server for caching.

TUTORIAL: HOW TO SET UP AND TEST OFFLINE SUPPORT

Browse the site in which the list you want to enable Offline Support is. Tap the Edit button then tap the list.

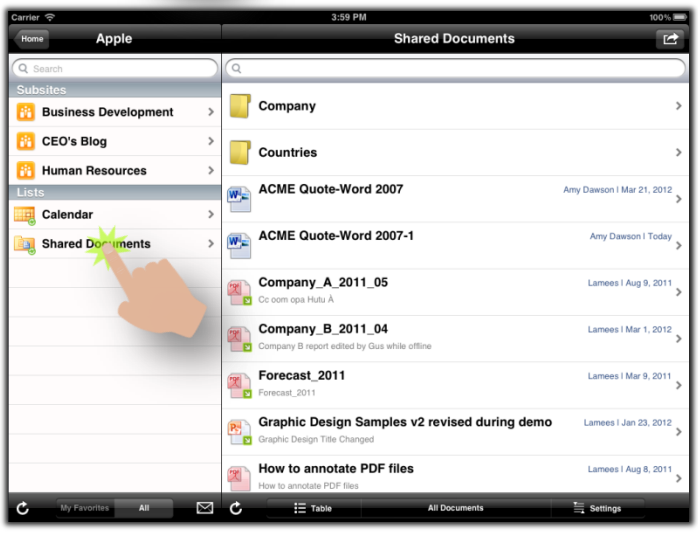
Set Offline Support ON. Select a Sync Mode, a List View, choose whether to use Wi-Fi only or not and the remaining options to fit your needs. Tap Done to save your settings.



Let the app sync the list/library by either tapping the Refresh button in the navigator or by leaving the app idle for 30 seconds for the sync process to be triggered.

You will notice the list/library has been synced because of the sync status icon over the list icon (Green: 100% synced; Red: not completely synced; Spinning: syncing). You may also check what items have been synced with the sync status icon over the items.

Go back to the Home Screen and tap the Go Offline button.



Now browse the list for which you just enabled offline support. You will notice its icon has a green circle: this means the list is fully synchronized. Try adding, editing and deleting a list item.

At this point you may have already noticed that new items have a green marker with a plus; deleted items have a red marker with a minus and edited items have a blue marker with a pencil.

Now go back to the Home Screen and tap the Go Online button. Browse the list again and tap the red button in the lower-right side of the screen. This will display a list of all changed made while offline. Tap each item to decide what to do with each one.

Keep in mind that there may be conflicts if two or more people edit an item at the same time. SharePlus has a conflict resolution engine that'll help you decide in these situations.

ADDITIONAL RESOURCES FOR SHAREPLUS PRO

SHAREPLUS FORUMS AT INFRAGISTICS.COM

SHAREPLUS YOUTUBE CHANNEL

SHAREPLUS IOS FAQ

SHAREPLUS KNOWLEDGE BASE

INFRAGISTICS HOME PAGE

FOLLOW US ON TWITTER

LIKE US ON FACEBOOK

SHAREPLUS ENTERPRISE FEATURES

On top of SharePlus PRO features, the Enterprise version of SharePlus has additional features like Advanced Search and User Profiles Search.

This set of power features may not be fully available depending on your custom version's configuration. Other custom implemented features will be described in an appendix attached to this User Guide.

ENTERPRISE SEARCH

Enterprise SharePoint implementations usually count with a server-side enterprise search engine. This enterprise search provides full control over indexing, enhanced security, multiple file type support and ability to search structured and unstructured data, among several other features.

SharePlus takes advantage of all this power and puts is in your hands. You can choose a scope, select what result type you need to obtain and filter by dates and author. You may also trim duplicates or ignore noise words like "a" or "and", for example.

The options and results are defined by the server and are displayed respecting relevance, as defined by the SharePoint search engine, in a clean and intuitive list view.

QUICK TUTORIAL

In order to search your site using Enterprise Search you must first browse it. You will see a search bar over the navigator.

Tap the search bar for the Enterprise Search options to be displayed. Input your search criteria in the search bar.

You may define a scope (1); filter by result type (2); and modified date (3); or author (4). In order to trim duplicated results (5) or ignore noise words (6) you need to tap the Settings button at the bottom bar, next to the magnifying glass.

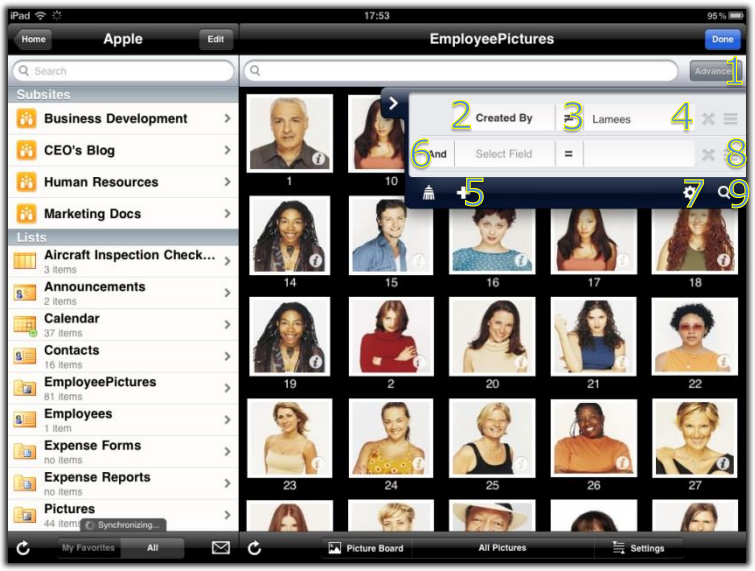
ADVANCED LIST SEARCH

The Advanced List Search feature allows you to search in your lists and libraries defining a richer and more complex criterion -- even including sub-folders.

The Advanced List Search also works as a filter for the current view. In fact, if the SharePoint view for the list or library has filtering options, these will be set in the Advanced Search Options.

QUICK TUTORIAL

Browse the list or library in which you want to run an advanced search and tap the search bar over the content pane.



Tap the advanced button (1). Then select the field you want to use as the search criteria (2). Choose a condition (3) and input the search term (4). You may add extra fields (5) or set the extra fields as And/OR (6). You can also Include Subfolders (7) and re-order the fields (8). Finally, tap the magnifying glass to search (9).

AUTHENTICATION TIME BOMB

Authentication Time Bomb is an extra level of security which makes mandatory for the user to authenticate against the servers of all set up sites (doesn't apply to sites with anonymous access) every a certain period of time.

If the user does not authenticate online after the defined period all passwords are deleted for all sites. This means that, to access the sites again, the user will have to provide the right password for all set up sites and authenticate online.

After a certain amount of failed login attempts all cached data, sites, local files and favorites, will be permanently deleted.

The settings for this feature are set in a central configuration file and include:

- How many hours the user can browse the app without logging in to the server (in Offline Support mode).
- How many times the user can fail to log in when trying to access a site that requires authentication.

- The message that the application will show when the user fails to authenticate after all the available authentication attempts have been exhausted.
- The message that the application will show every time the user fails to login.

This feature introduces minor changes to the end user experience. Nothing but the notifications will be seen by the user.

APPLICATION WHITELIST

In enterprise environments, companies usually have a suite of trusted apps for common tasks like document editing. The Application Whitelist feature can be configured to specify which apps SharePlus can send files to via the Open In protocol.

If you're trying to Open In a document an can only see one app, even though you do have other apps capable of editing the document, the your version of SharePlus Enterprise has Application Whitelist enabled.

If you don't see any app at all, having apps that do support the document you're trying to open, then you don't have the app your company has whitelisted for SharePlus or the file is not supported by the whitelisted app.

GOOD MOBILE MESSAGING INTEGRATION

For several different reasons, companies that have rolled out iOS devices to employees prefer to use Good Mobile Messaging instead of iOS' Email app.

Good Mobile Messaging is a mobile app provided by Good Technologies that allows the use of corporate mail and calendaring on the iPad in a secure way.

Once the proper key has been configured in the central configuration file, when a user sends an email from SharePlus, instead of the device's mail, GMM will be used to send the message. This is the only difference for the user besides the inability to attach files to emails.

MY SITE

SharePlus Enterprise can be configured to automatically set up a user's My Site when a particular site (defined in the central configuration file) is added to SharePlus. This works like a "shortcut" to the user's My Site in SharePlus' home screen.

If your MySite doesn't exist, SharePlus will show a message alerting the user. The app won't check for the MySite URL again unless the user forces it by tapping and holding the Site's cell and tap the "Check My Site" option.

SharePoint MySites are personal sites dynamically provisioned by the server. The URL of these sites is formed combining a common root with the name of the user, such as:

http://www.contoso.com/personal/username

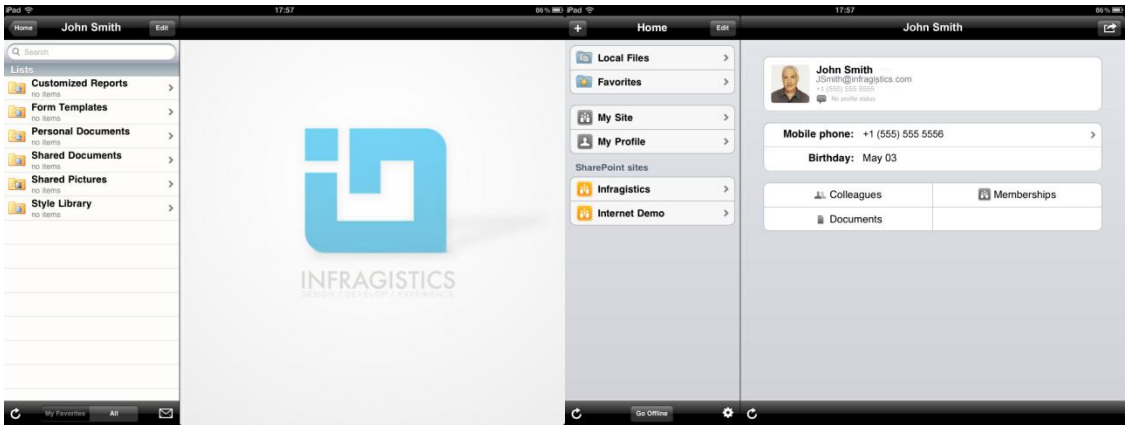
Instead of asking the user to configure a new connection to his personal site, besides the company's, SharePlus will automatically detect his MySite's URL and link it to the My Site button in SharePlus' home. SharePlus identifies the user's MySite and MyProfile the first time the user taps on the main SharePoint site:

After you've entered your credentials, SharePlus will add the My Site and My Profile buttons to the home screen and will automatically browse the company's site you just tapped:

If the user's MySite doesn't exist, the app will show a message with an alert:

The app won't check for the MySite URL again unless the user forces it by tapping and holding the Site's cell and tap the "Check My Site" option:

Once the MySite and MyProfile buttons have been correctly linked to your personal site and profile you will be able to browse them by tapping them:

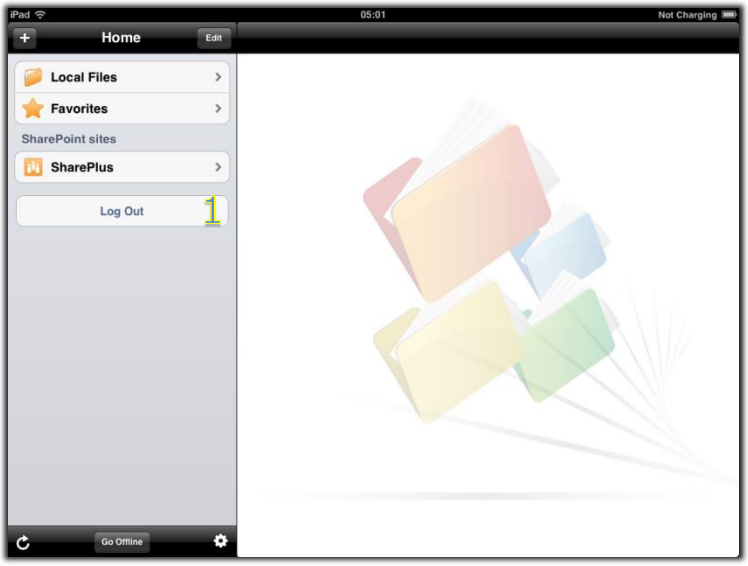


SESSION MANAGEMENT (KIOSK MODE)

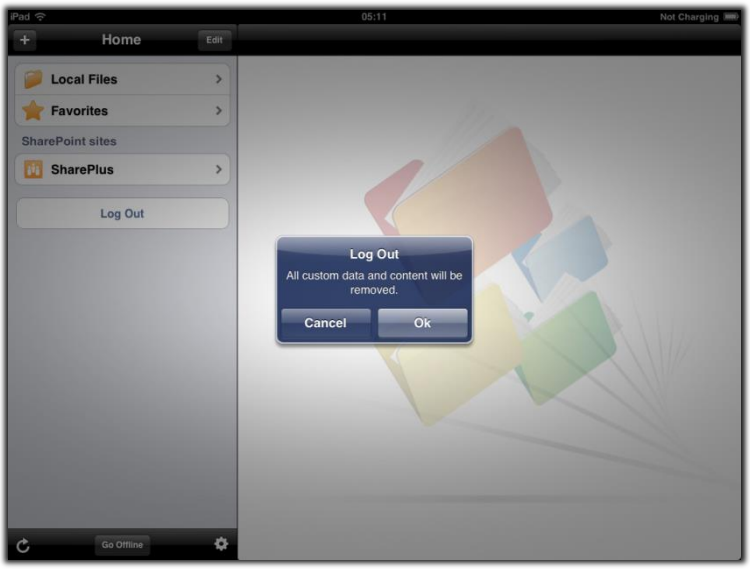
In some usage scenarios, SharePlus is required to behave as a session-based application. This is achieved with the Session Management feature. In other words, SharePlus can save data of the current session while it is active but wipe all user data and reset to its initial stat as soon as the session ends or the user logs out.

This feature is very versatile and can be highly customizable. How it behaves really depends on how it was configured.

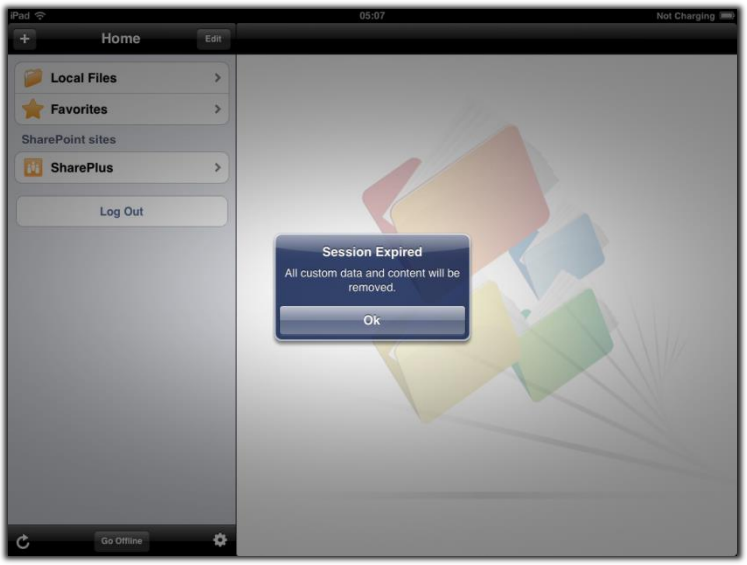
As an example, let's review the Session Management feature using a more or less standard configuration: SharePlus will have a "Log out" button and will be configured to have a "Session timer" that makes the session expire after a certain period of time. When the session expires, all data is wiped from the app.



The "Log out" (1) button is at the bottom of your site list. This wipes all data from the app and finishes your session.



Once you tap the Log Out button you'll receive a notice to make sure you really want to log out and delete all data. Tap OK to confirm and close your session or Cancel to remain authenticated and carry on working with SharePlus.



Depending on the timer settings for the Session Timeout feature, your session can expire after a certain period of time. When this happens, you also get a notice to make sure you know why your session was closed and your data deleted. You can't cancel this.